

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
PIERCE BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

July 28, 1952

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Aid to the Blind Manual Letter No. 13.

These regulations were adopted by the State Social Welfare Board on July 25, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.6, and 114(b), and are being filed in accordance with Sections 11380 and 11422 of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public procedure.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

JUL 28 1952 3:05 P.M.

FRANK M. JORDAN, Secretary of State

By *Chm. J. J. J.*
Assistant Secretary of State

The monthly earned income, not exceeding \$50, of an applicant for, or recipient of, ANB shall not be considered in determining the amount of aid.

Exempt earned income is defined as follows:

Income in cash or kind earned by an applicant or recipient of ANB through the receipt of wages, salary, commissions, or profit from activities in which he is engaged as a self-employed individual or as an employee. Such exempt earned income may be derived from his own employment, such as business enterprise, or farming; or derived from wages, salary or commissions received as an employee. It includes earnings over a period of time for which settlement is made at one given time, as in the instance of sale of farm crops, livestock, or poultry.

With reference to commission, wages, or salary, the term "exempt earned income" means the total amount, irrespective of expenses such as income tax deductions, lunches, and transportation to and from work. However, expenses of employment, such as the cost of tools, materials, special uniforms, or transportation to call on customers are deductible from the gross remuneration, if furnished by the employee.

In the instance of self-employment, the term "exempt earned income" means the total profit from business enterprise, farming, etc., resulting from a comparison of the gross income received with the "business expenses," i.e., total cost of the production of the income. Expenses such as income tax payments, lunches, and transportation to and from work are not classified as business expenses.

Returns from personal or real property holdings, such as the net income from rental of rooms, from purveying of board and room, from crops or livestock, etc., shall not be considered exempt earned income unless such returns result from an appreciable and continuous effort on the part of the applicant or recipient.

All income, other than exempt earned income, and earned net income in excess of \$50 shall be considered in determining the amount of aid. (See Secs. B-532, Definitions, B-538, Division of Income with Spouse and B-560, Net Income from Wages, Salaries and Commissions)

If earned income is received in a lump sum payment for services rendered over a period of more than one month, a sum up to \$50 (depending on the amount of other exempt income which may have been received) multiplied by the number of months during which the lump sum income was earned shall be exempt from consideration. (See Sec. B-574, Recurring Lump Sum Income in ANB)

Example 1: An ANB recipient has exempt income from earnings of \$40 a month. In addition, he has income from a life insurance policy of \$10 a month. Discussion with the recipient reveals that he has a special need for a telephone in the amount of \$4 a month. The recipient receives a grant of \$79.

Example 2: An ANB applicant (not eligible for APSB because of residence) has earned income of \$80 a month. In addition he receives \$20 a month from a son. Discussion with the applicant reveals he has special needs for housekeeping service and a telephone which totals \$50 a month. Since \$50 of the earned income is exempt from all consideration, the applicant actually has \$50 (\$30 plus \$20 from the son) non-exempt income with which to meet his needs. Therefore, special need of \$50 is established and the applicant is eligible for the maximum grant of \$85.

Example 3: An ANB recipient (not eligible for APSB because of residence) has earned income of \$80 a month, and in addition, receives \$20 a month from a son. Discussion with the recipient reveals he has special needs for medical and housekeeping services which total \$70 a month. Since \$50 of the earned income is exempt from all consideration, the recipient actually has \$50 (\$30 plus \$20 from the son) of non-exempt income with which to meet his needs partly. While special needs of \$70 are established, there is only \$50 of non-exempt income to be applied toward meeting these special needs, leaving an unmet need of \$20. The recipient receives the maximum grant of \$85.

Example 4: A married ANB recipient (ineligible for APSB because of residence) has income from earnings in the amount of \$110 a month. His wife has no income and her need has been determined to be \$80 a month. As \$50 of the recipient's income from earnings is exempt to the recipient, he may allocate a like amount, or \$50, to the support of his spouse (see Sec. B-538) thus leaving \$10 as non-exempt income to the recipient. The recipient is entitled to a grant of \$75 (\$85 minus \$10 non-exempt income), if he has no special needs. (If in the same example the recipient's income from earnings were \$87 a month, the first \$50 would be considered exempt to him, and the spouse would be allocated \$37 toward her support.)

Example 5: An Aid to Needy Blind recipient is employed at a salary of \$80 a month. It is determined that he has regular monthly expense of employment in the amount of \$1.50 for a tool to be deducted from the \$80, leaving \$78.50. Of this amount \$50 is exempt from all consideration, leaving a balance of \$28.50. It is then determined that the cost of lunches and carfare, both directly incident to the employment, amount to \$15 a month which, when deducted from the \$28.50, leaves \$13.50 net income which shall be taken into consideration in determining the amount of the grant.

The case record shall show the method used in determining the amount of income exempt from consideration in computing the amount of aid.

Property accumulated from earnings shall be given the same treatment as property accumulated from any other source.

(W&IC 3075, 3084.3)

Recurring lump sum income is defined as that net income which has accrued over two or more months and which can be expected to be repeated in the future in the same or a different amount. Included would be income received at intervals less frequently than monthly from the following sources:

1. Crop income
2. Pension payments
3. Rental or lease income
4. Contributions to meet taxes
5. Stock dividend payments (if determined to be from other than an inconsequential resource)
6. Trust fund payments
7. Accrued salary, wages, or commissions

Recurring lump sum income (or the recipient's share thereof) shall be utilized by the recipient to meet his needs for future months, and no portion of it shall be considered to become personal property. ~~(See Sec. B540, Exempt Income in ANB)~~ *INSERT*

If such income is from earnings (See Sec. B-540, Exempt Income in ANB), a sum up to \$50 (depending on the amount of other exempt income which may have been received) multiplied by the number of months during which the lump sum income was earned shall be exempt from consideration.

2. Non-recurring lump sum payments (from sources other than exempt income) which are personal property immediately upon receipt. (See Secs. B-457 and B-540).
3. Lump sum payments representing income accrued over two or more months if the recipient continues thereafter to receive monthly income from the same source, e.g., lump sum OASI payment followed by regular monthly OASI payments.

A. RECURRING LUMP SUM INCOME RECEIVED AT SPECIFIED INTERVALS IN A FIXED AMOUNT

Recurring lump sum income (other than exempt income from earnings) in an amount not subject to change (or the recipient's share thereof) which is received at specified intervals in excess of one month shall be divided by the number of months over which it accrued. The resultant figure shall be considered as income when determining the grant for an equivalent number of future months and no part of such lump sum shall be considered personal property.

(Section Continued on Next Page)

Example 1: A single recipient of ANB with monthly need of \$90 receives a semi-annual ministerial pension of \$120. This is his only income. One hundred twenty dollars divided by six (the number of months over which it accrued) is \$20. If there is no change in need or income, the grant for the next six months is \$70 (\$90 need less \$20 income).

B. RECURRING LUMP SUM INCOME RECEIVED AT VARIABLE INTERVALS AND/OR IN VARIABLE AMOUNTS

Recurring lump sum income in an amount subject to change (or the recipient's share thereof) which is received at regular or irregular intervals shall be utilized toward meeting the recipient's needs as follows:

1. If the lump sum income together with the recipient's other income is less than his need in the month received, all of the lump sum except exempt income from earnings shall be considered as income in the month received. (For exception see Item B 3 below.)

Example 2: A recipient receives lump sum income in a variable amount in August of each year from a source other than earnings. In August of the current year he receives \$61.25. He is receiving a \$70 grant (continuing need \$100 and regular monthly income of \$30).

The grant for September is reduced to \$8.75 (\$100 less \$30 regular income and \$61.25 lump sum). The grant is increased effective October 1 to \$70.

2. If the lump sum income other than exempt income from earnings (or recipient's share thereof) together with the recipient's other income is equal to or more than his need in the month received, aid shall be discontinued. (For exception see Item B 3 below.) At the time of discontinuance, he shall be advised of the approximate period over which the income is expected to support him and that it is his responsibility to request restoration when he is again in need.

To determine the approximate period during which the income is expected to support the recipient, his lump sum income received shall be divided by that figure which represents the difference between his total need as determined at that time and his continuing income at the time the lump sum was received. If such income is from earnings (See Sec. B-540, Exempt Income in ANB), a sum up to \$50 (depending on the amount of other exempt income which may have been received) multiplied by the number of months during which the lump sum income was earned shall be exempt from consideration.

Example 3: In September a recipient and his ineligible spouse receive \$1,490 income from a crop which matures annually, such income resulting from their joint efforts. The recipient's share of the lump sum income is \$745, and he had no other income from earnings. At the time the lump sum is received the recipient's grant is \$65 (\$95 need less \$30 continuing income). Discontinue aid effective September 30 and advise the recipient that, since the lump sum income is from earnings, \$50 a month is exempt for each of the

(Section Continued on Next Page)

months during which the income was earned (\$50 a month for 12 months is \$600), and that the remaining share of the lump sum income will be expected to support him for two full months (\$745 less \$600 exempt income leaves a balance of \$145, divided by \$65 is 2.23 months), or through the month of November.

If the lump sum income is a partial payment of the amount due and the balance is to be received before the expiration of the period during which the partial payment is expected to meet the needs, the period shall be extended. He shall be requested to report the additional income when it is received or to maintain a suitable record of the income when it is received. At that time the period over which his income is expected to support him shall be redetermined by dividing the total income received from all installments by the difference between his total need and his continuing income at the time the initial lump sum was received.

The recipient may fail to report subsequent installments of his lump sum income when it is received. If he requests restoration on a future date, the period over which the total proceeds would be expected to provide for his support shall be redetermined at that time. Eligibility for restoration shall then be determined according to Item C 1 or C 2, whichever is applicable.

3. If the lump sum income is a contribution to the recipient to cover a periodically recurring need such as taxes on his home, both the need and the income shall be prorated on a monthly basis.

Example 4: The need of a single ANB recipient including prorated taxes on his home is \$94 a month. Semi-annual taxes of \$63 (\$126 a year) are made by a nephew in November and April of each year. The recipient has no other income. On a prorated monthly basis, the income from the nephew is determined to be \$10.50 a month. ANB of \$83.50 is paid each month (\$94 less \$10.50).

Subsection C not relevant to the change omitted from this agenda

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Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
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616 K STREET
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STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

July 28, 1952

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Manual Letter No. 159.

These regulations were adopted by the State Social Welfare Board on July 25, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, 114b, 119.5, and 119.6, and are being filed in accordance with Sections 11380 and 11422 of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

~~PAID~~

JUL 28 1952

FRANK M. JORDAN, Secretary of State

By *R. J. Mannini*

FILED

In the office of the Secretary of State
of the State of California

JUL 28 1952 3:05 PM

FRANK M. JORDAN, Secretary of State

By *Am. J. ...*
Assistant Secretary of State

CLASSIFICATIONSCHEDULE OF STEPS

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
County Welfare Director V	415	439	464	491	519	549	581	614	649	686	725
County Welfare Director IV	351	371	392	415	439	464	491	519	549	581	614
County Welfare Director III	297	314	332	351	371	392	415	439	464	491	519
County Welfare Director II	252	266	281	297	314	332	351	371	392	415	439
County Welfare Director I	201	213	225	238	252	266	281	297	314	332	351
Assistant County Welfare Director	332	351	371	392	415	439	464	491	519	549	581
Social Work Supervisor II	281	297	314	332	351	371	392	415	439	464	491
Social Work Supervisor I	238	252	266	281	297	314	332	351	371	392	415
Child Welfare Supervisor II	281	297	314	332	351	371	392	415	439	464	491
Child Welfare Supervisor I	266	281	297	314	332	351	371	392	415	439	464
Child Welfare Services Worker II	225	238	252	266	281	297	314	332	351	371	392
Child Welfare Services Worker I	201	213	225	238	252	266	281	297	314	332	351
Social Worker II	190	201	213	225	238	252	266	281	297	314	332
Social Worker I	170	180	190	201	213	225	238	252	266	281	297
Chief Account Clerk	238	252	266	281	297	314	332	351	371	392	415
Senior Account Clerk	190	201	213	225	238	252	266	281	297	314	332
Account Clerk	161	170	180	190	201	213	225	238	252	266	281
Senior Stenographer Clerk	190	201	213	225	238	252	266	281	297	314	332
Intermediate Stenographer Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Stenographer Clerk	144	152	161	170	180	190	201	213	225	238	252
Senior Typist Clerk	180	190	201	213	225	238	252	266	281	297	314
Intermediate Typist Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Typist Clerk	144	152	161	170	180	190	201	213	225	238	252
Chief Clerk	225	238	252	266	281	297	314	332	351	371	392
Senior Clerk	180	190	201	213	225	238	252	266	281	297	314
Intermediate Clerk	161	170	180	190	201	213	225	238	252	266	281
Junior Clerk	144	152	161	170	180	190	201	213	225	238	252
Receptionist	161	170	180	190	201	213	225	238	252	266	281

The above salary schedule shall be effective the same date the county budget and/or salary ordinance, or any amendment thereof, becomes effective for the fiscal year 1952-53. For changes in pay ranges, see modification procedure specified in Sec. 071-10, Adoption of Compensation Plan. (W&IC 119.5, 119.6)

~~(a) For simplicity.~~

~~(b) To establish a revised pay range in order to establish a proper differential in pay between it and the new class.~~

~~(c) To establish a new class and a pay range required under the new CWS Plan for California.~~

~~X~~

FILED

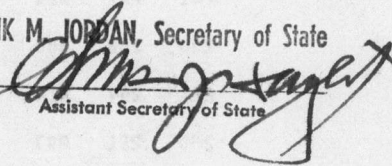
In the office of the Secretary of State
of the State of California

JUL 28 1952 3:05 P.M.

FRANK M. JORDAN, Secretary of State

By

Assistant Secretary of State



The above policy on this shall be effective in the state the county judge
and/or other officers, or the incumbent thereof, become effective for the fiscal
year 1952-53. For changes in the 1952-53, see addition procedure specified in
Sec. 071-10, Adoption of Commission Plan. (WIC 11-5, 11-6)

- (c) for eligibility.
- (d) to establish a revised pay range in order to establish a wage differential in
pay between it and the new class.
- (e) to establish a new class and a pay range provided under the new CDS plan for
California.

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. J. Schenk
(Signature)

Director
(Title)

7-31-52
(Date)

AREA OFFICES

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Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

July 31, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

FILED

ADDRESS REPLY TO: the Secretary of State
of the State of California

AUG 1 1952 11:08 a.m.

FRANK M. JORDAN, Secretary of State

By *Wm J. Langer*
Assistant Secretary of State

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State
Department of Social Welfare.

DEPARTMENT BULLETIN NO. 434-A (Merit System)
DEPARTMENT BULLETIN NO. 467-A (Statistical)
DEPARTMENT BULLETIN NO. 471 (Merit System)

These regulations were approved by the State Social Welfare
Board pursuant to the powers conferred upon it by the Welfare and
Institutions Code, Sections 103, 103.5, 103.6, 115, 116, 119.5, and
119.6 on July 24, 1952, and are being filed in accordance with Section 11380
of the Government Code.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 1, 1952

DEPARTMENT BULLETIN NO. 434-A (Merit System)

TO: COUNTY WELFARE DIRECTORS
(Excluding Alameda, Contra Costa, Fresno,
Los Angeles, San Bernardino, Sacramento,
San Diego, San Francisco, San Mateo,
Santa Clara, and Ventura counties)

CC: CHAIRMEN, COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS
COUNTY CLERKS

Subject: New class specifications for
Child Welfare Services Worker I,
and changes in titles of present
Child Welfare Services classes.

Attached are new class specifications for Child Welfare Services Worker I, as approved by the State Social Welfare Board on July 24, 1952. Please insert the new class specifications in your copy of the "Classification Plan for County Welfare Departments." Also, please note the changes in titles for the present Child Welfare Services classes as listed below:

<u>Former Title</u>	<u>New Title</u>
County Child Welfare Supervisor II	Child Welfare Supervisor II
County Child Welfare Supervisor I	Child Welfare Supervisor I
Child Welfare Services Worker	Child Welfare Services Worker II

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachment

FILED

In the office of the Secretary of State
of the State of California

AUG 1 1952 11:08 a.m.

FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

for additional medical and health services for children in the community, and in the development of such a program; cooperates with public and private agencies in giving services to children; maintains case histories; dictates letters and prepares reports; makes addresses concerning child welfare; participates in group and committee discussions of social problems affecting children generally.

Minimum Qualifications:

Education: One year of successfully completed graduate study within the past three years in a recognized school of social work, which shall have included a year of supervised field work.

First year graduate students registered in a recognized school of social work who have completed either the first semester or second quarter (including field work) will be admitted to the examination, but they must produce evidence of completion of the first year of graduate study in a recognized school of social work before they can be considered eligible for appointment from the eligible list.

Knowledge:

- (1) Wide knowledge of social case work principles and methods, including interviewing and recording as they apply to the field of child welfare.
- (2) Wide knowledge of and skill in applying modern social welfare techniques with particular reference to child welfare.
- (3) General knowledge of the provisions of the Social Security Act pertaining to aid to needy children and child welfare.
- (4) General knowledge of welfare problems which call for the use of public and private community resources for children.
- (5) General knowledge of the conditions affecting child welfare and of the methods of strengthening and extending child welfare services in rural areas and areas of special need.
- (6) General knowledge of the principles of community organization.
- (7) General knowledge of the literature in the field of social work.
- (8) Familiarity with the purposes and activities of various public and private welfare agencies.
- (9) Familiarity with current socio-economic problems directly affecting child welfare.

CHILD WELFARE SERVICES WORKER I

Established: 7/24/52

Revised:

Title Changed:

Definition:

Under close supervision, adapts knowledge and skills acquired in graduate training to an agency child welfare program; applies modern case-work principles and techniques in providing services for children needing care and protection in their own home and in foster care; participates in developing community resources for children; and does other related work as required.

Job Characteristics:

This class is designed to recruit personnel who have successfully completed at least one full year of graduate study in social work, and who have a high degree of interest in and aptitude for performing social work services for children. Normally workers remain in this class for one year, after which they will have opportunities to advance to Child Welfare Services Worker II positions.

Workers in this class carry a smaller caseload than Child Welfare Services Worker II's and are usually under the supervision of a Child Welfare Services Supervisor. Assigned cases are generally of all types and all degrees of difficulty involving problems of children in need of individual attention and intensive service without regard to the children's eligibility for public assistance. Assigned cases are selected to help the worker adapt knowledges and skills acquired in graduate training to an agency child welfare program. A Child Welfare Services Worker I assists in community planning and organization. Intensive case work supervision is provided to help the Child Welfare Services Worker I learn (1) agency functions, (2) policies and procedures in an agency setting, and (3) the application of case work methods in giving service to children and their families. As experience is gained, a Child Welfare Services Worker I carries an increasingly greater responsibility and works with less detailed supervision; however, case planning and work methods continue to receive close review.

Typical Tasks:

Visits children in their own homes; interviews relatives, nurses, teachers, and other individuals and agency representatives for the purpose of securing information necessary to determine service to be given or action to be taken; takes applications; carries a limited number of cases presenting problems of children, which may include Aid to Needy Children, county indigent cases, or cases accepted for service from other sources; locates and investigates foster homes; arranges foster care for children in private family homes or institutions, and supervises the placement and care of children placed therein; secures custodial or other care for mentally handicapped children; protects children from exploitation, removing them from unsuitable surroundings through authorized procedures; assists schools in dealing with behavior problems; obtains necessary medical, psychological, and psychiatric services for children in need of such services and carries out a social plan based on the findings; assists in the study of the need

Ability:

- (1) To work effectively with children.
- (2) To utilize community resources in providing care for children.
- (3) To maintain cooperative relationships with the representatives of public and private agencies.
- (4) To appraise situations and people accurately, to adopt an effective course of action, and to get along well with others.
- (5) To prepare complete and concise reports.
- (6) To follow oral and written directions.
- (7) To drive an automobile safely.

Personal Characteristics:

Tact, tolerance, adaptability, initiative, integrity, resourcefulness, keenness of observation, good judgment, pleasing personality, neat personal appearance, emotional stability, good health, freedom from disabling defects, and potentiality for professional development under supervision.

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 1, 1952

DEPARTMENT BULLETIN NO. 434-A (Merit System)

TO: COUNTY WELFARE DIRECTORS
(Excluding Alameda, Contra Costa, Fresno,
Los Angeles, San Bernardino, Sacramento,
San Diego, San Francisco, San Mateo,
Santa Clara, and Ventura counties)

CC: CHAIRMEN, COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS
COUNTY CLERKS

Subject: New class specifications for
Child Welfare Services Worker I,
and changes in titles of present
Child Welfare Services classes.

Attached are new class specifications for Child Welfare Services Worker I, as approved by the State Social Welfare Board on July 24, 1952. Please insert the new class specifications in your copy of the "Classification Plan for County Welfare Departments." Also, please note the changes in titles for the present Child Welfare Services classes as listed below:

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Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachment

for additional medical and health services for children in the community, and in the development of such a program; cooperates with public and private agencies in giving services to children; maintains case histories; dictates letters and prepares reports; makes addresses concerning child welfare; participates in group and committee discussions of social problems affecting children generally.

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First year graduate students registered in a recognized school of social work who have completed either the first semester or second quarter (including field work) will be admitted to the examination, but they must produce evidence of completion of the first year of graduate study in a recognized school of social work before they can be considered eligible for appointment from the eligible list.

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- (2) Wide knowledge of and skill in applying modern social welfare techniques with particular reference to child welfare.
- (3) General knowledge of the provisions of the Social Security Act pertaining to aid to needy children and child welfare.
- (4) General knowledge of welfare problems which call for the use of public and private community resources for children.
- (5) General knowledge of the conditions affecting child welfare and of the methods of strengthening and extending child welfare services in rural areas and areas of special need.
- (6) General knowledge of the principles of community organization.
- (7) General knowledge of the literature in the field of social work.
- (8) Familiarity with the purposes and activities of various public and private welfare agencies.
- (9) Familiarity with current socio-economic problems directly affecting child welfare.

CHILD WELFARE SERVICES WORKER I

Established: 7/24/52

Revised:

Title Changed:

Definition:

Under close supervision, adapts knowledge and skills acquired in graduate training to an agency child welfare program; applies modern case-work principles and techniques in providing services for children needing care and protection in their own home and in foster care; participates in developing community resources for children; and does other related work as required.

Job Characteristics:

This class is designed to recruit personnel who have successfully completed at least one full year of graduate study in social work, and who have a high degree of interest in and aptitude for performing social work services for children. Normally workers remain in this class for one year, after which they will have opportunities to advance to Child Welfare Services Worker II positions.

Workers in this class carry a smaller caseload than Child Welfare Services Worker II's and are usually under the supervision of a Child Welfare Services Supervisor. Assigned cases are generally of all types and all degrees of difficulty involving problems of children in need of individual attention and intensive service without regard to the children's eligibility for public assistance. Assigned cases are selected to help the worker adapt knowledges and skills acquired in graduate training to an agency child welfare program. A Child Welfare Services Worker I assists in community planning and organization. Intensive case work supervision is provided to help the Child Welfare Services Worker I learn (1) agency functions, (2) policies and procedures in an agency setting, and (3) the application of case work methods in giving service to children and their families. As experience is gained, a Child Welfare Services Worker I carries an increasingly greater responsibility and works with less detailed supervision; however, case planning and work methods continue to receive close review.

Typical Tasks:

Visits children in their own homes; interviews relatives, nurses, teachers, and other individuals and agency representatives for the purpose of securing information necessary to determine service to be given or action to be taken; takes applications; carries a limited number of cases presenting problems of children, which may include Aid to Needy Children, county indigent cases, or cases accepted for service from other sources; locates and investigates foster homes; arranges foster care for children in private family homes or institutions, and supervises the placement and care of children placed therein; secures custodial or other care for mentally handicapped children; protects children from exploitation, removing them from unsuitable surroundings through authorized procedures; assists schools in dealing with behavior problems; obtains necessary medical, psychological, and psychiatric services for children in need of such services and carries out a social plan based on the findings; assists in the study of the need

Ability:

- (1) To work effectively with children.
- (2) To utilize community resources in providing care for children.
- (3) To maintain cooperative relationships with the representatives of public and private agencies.
- (4) To appraise situations and people accurately, to adopt an effective course of action, and to get along well with others.
- (5) To prepare complete and concise reports.
- (6) To follow oral and written directions.
- (7) To drive an automobile safely.

Personal Characteristics:

Tact, tolerance, adaptability, initiative, integrity, resourcefulness, keenness of observation, good judgment, pleasing personality, neat personal appearance, emotional stability, good health, freedom from disabling defects, and potentiality for professional development under supervision.

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 1, 1952

DEPARTMENT BULLETIN NO. 434-A (Merit System)

TO: COUNTY WELFARE DIRECTORS
(Excluding Alameda, Contra Costa, Fresno,
Los Angeles, San Bernardino, Sacramento,
San Diego, San Francisco, San Mateo,
Santa Clara, and Ventura counties)

CC: CHAIRMEN, COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS
COUNTY CLERKS

Subject: New class specifications for
Child Welfare Services Worker I,
and changes in titles of present
Child Welfare Services classes.

Attached are new class specifications for Child Welfare Services Worker I, as approved by the State Social Welfare Board on July 24, 1952. Please insert the new class specifications in your copy of the "Classification Plan for County Welfare Departments." Also, please note the changes in titles for the present Child Welfare Services classes as listed below:

<u>Former Title</u>	<u>New Title</u>
County Child Welfare Supervisor II	Child Welfare Supervisor II
County Child Welfare Supervisor I	Child Welfare Supervisor I
Child Welfare Services Worker	Child Welfare Services Worker II

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachment

for additional medical and health services for children in the community, and in the development of such a program; cooperates with public and private agencies in giving services to children; maintains case histories; dictates letters and prepares reports; makes addresses concerning child welfare; participates in group and committee discussions of social problems affecting children generally.

Minimum Qualifications:

Education: One year of successfully completed graduate study within the past three years in a recognized school of social work, which shall have included a year of supervised field work.

First year graduate students registered in a recognized school of social work who have completed either the first semester or second quarter (including field work) will be admitted to the examination, but they must produce evidence of completion of the first year of graduate study in a recognized school of social work before they can be considered eligible for appointment from the eligible list.

Knowledge:

- (1) Wide knowledge of social case work principles and methods, including interviewing and recording as they apply to the field of child welfare.
- (2) Wide knowledge of and skill in applying modern social welfare techniques with particular reference to child welfare.
- (3) General knowledge of the provisions of the Social Security Act pertaining to aid to needy children and child welfare.
- (4) General knowledge of welfare problems which call for the use of public and private community resources for children.
- (5) General knowledge of the conditions affecting child welfare and of the methods of strengthening and extending child welfare services in rural areas and areas of special need.
- (6) General knowledge of the principles of community organization.
- (7) General knowledge of the literature in the field of social work.
- (8) Familiarity with the purposes and activities of various public and private welfare agencies.
- (9) Familiarity with current socio-economic problems directly affecting child welfare.

CHILD WELFARE SERVICES WORKER I

Established: 7/24/52

Revised:

Title Changed:

Definition:

Under close supervision, adapts knowledge and skills acquired in graduate training to an agency child welfare program; applies modern case-work principles and techniques in providing services for children needing care and protection in their own home and in foster care; participates in developing community resources for children; and does other related work as required.

Job Characteristics:

This class is designed to recruit personnel who have successfully completed at least one full year of graduate study in social work, and who have a high degree of interest in and aptitude for performing social work services for children. Normally workers remain in this class for one year, after which they will have opportunities to advance to Child Welfare Services Worker II positions.

Workers in this class carry a smaller caseload than Child Welfare Services Worker II's and are usually under the supervision of a Child Welfare Services Supervisor. Assigned cases are generally of all types and all degrees of difficulty involving problems of children in need of individual attention and intensive service without regard to the children's eligibility for public assistance. Assigned cases are selected to help the worker adapt knowledges and skills acquired in graduate training to an agency child welfare program. A Child Welfare Services Worker I assists in community planning and organization. Intensive case work supervision is provided to help the Child Welfare Services Worker I learn (1) agency functions, (2) policies and procedures in an agency setting, and (3) the application of case work methods in giving service to children and their families. As experience is gained, a Child Welfare Services Worker I carries an increasingly greater responsibility and works with less detailed supervision; however, case planning and work methods continue to receive close review.

Typical Tasks:

Visits children in their own homes; interviews relatives, nurses, teachers, and other individuals and agency representatives for the purpose of securing information necessary to determine service to be given or action to be taken; takes applications; carries a limited number of cases presenting problems of children, which may include Aid to Needy Children, county indigent cases, or cases accepted for service from other sources; locates and investigates foster homes; arranges foster care for children in private family homes or institutions, and supervises the placement and care of children placed therein; secures custodial or other care for mentally handicapped children; protects children from exploitation, removing them from unsuitable surroundings through authorized procedures; assists schools in dealing with behavior problems; obtains necessary medical, psychological, and psychiatric services for children in need of such services and carries out a social plan based on the findings; assists in the study of the need

Ability:

- (1) To work effectively with children.
- (2) To utilize community resources in providing care for children.
- (3) To maintain cooperative relationships with the representatives of public and private agencies.
- (4) To appraise situations and people accurately, to adopt an effective course of action, and to get along well with others.
- (5) To prepare complete and concise reports.
- (6) To follow oral and written directions.
- (7) To drive an automobile safely.

Personal Characteristics:

Tact, tolerance, adaptability, initiative, integrity, resourcefulness, keenness of observation, good judgment, pleasing personality, neat personal appearance, emotional stability, good health, freedom from disabling defects, and potentiality for professional development under supervision.

Certified as a Regulation (or
as Regulations) of the

State Dept of Social Welfare
(Name of State Agency)

C. J. Schouland
(Signature)

Director
(Title)

8/14/52
(Date)

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

DIRECTOR

August 14, 1952

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

FILED
In the office of the Secretary of State
of the State of California
ADDRESS REPLY TO:
AUG 14 1952 3:04 PM
FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 474 (ANC)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 1511, and 1560 on August 13, 1952, and are being filed in accordance with Sections 11380 and 11422(b) of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest. Three copies of the "Finding of Emergency" adopted by the State Social Welfare Board on August 13, 1952 are attached.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

Tables I through IV of Manual Section C-512 are revised as follows:

Table I -- Maximum Participation Base for Children Living With a Parent or Other Relative

Number of eligible children in the same home	Maximum Participation Base
1	\$111
2	162
3	207
4	246
5	279
6	306
7	327
8	342
9	351
10	357
11	363
12	369
13	375
14	381
15 or more	387

Table II -- Maximum Reimbursement Amounts for Children Eligible for Federal Participation Living with a Needy Relative Eligible for Federal Participation

Number of Children	Maximum Participation Base	State Share	County Share	Federal Share
1	\$111	\$ 48	\$ 24	\$ 39
2	162	72	36	54
3	207	92	46	69
4	246	108	54	84
5	279	120	60	99
6	306	128	64	114
7	327	132	66	129
8	342	132	66	144
9	351	128	64	159
10	357	122	61	174
11	363	116	58	189
12	369	110	55	204
13	375	104	52	219
14	381	98	49	234
15 or more	387	92	46	249*

*See Section F-560 of the Manual of Fiscal Policies and Procedures for federal sharing for more than 15 children.

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
August 14, 1952

FILED

In the office of the Secretary of State
of the State of California

AUG 14 1952 3:04 PM

FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

DEPARTMENT BULLETIN NO. 474 (ANC)
TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: ANC Amendments to Social
Security Act, Effective
October 1, 1952

The Federal Social Security Act has been amended by the adoption of Public Law No. 590 (HR 7800). Public Law No. 590 contains two important provisions which affect Aid to Needy Children:

1. OASI payments to individuals are increased effective September 1, 1952. The first payments in the increased amounts will be received shortly after October 1, 1952.
2. Federal participation is increased to $\frac{4}{5}$ of the first \$15 of a state's average monthly payment, plus $\frac{1}{2}$ the balance up to \$30 for the eligible relative and for the first needy child and $\frac{4}{5}$ of the first \$15 plus $\frac{1}{2}$ the balance up to \$21 for each additional child. This, in effect, increases federal participation \$3 for each child and for the eligible relative (See Department Bulletin 475, Changes in Fiscal Policies and Procedures effective October 1, 1952.).

The Attorney General has expressed the following view: "...the increased federal payments for Aid to Needy Children provided in the Social Security Act amendment of 1952 do not change the previously established method of applying Section 1511 (a), but simply vary the terms of the formula by which the Federal Government's share is computed. The maximum amount of aid specified in Section 1511 (a) should therefore be increased in each case by the amount of \$3 for a caretaker and \$3 for each child. Thus, for example, the maximum amount of aid which might properly be granted where there is but one child in the home would be the sum of \$111, and where there are two children in the same home, the sum would be \$162."

Appropriate adjustments shall be made in assistance payments to take into consideration the increased federal participation effective October 1, 1952. This involves increasing payments for those cases in which the budgetary deficit exceeds the current participating maxima and in which payments have been limited to the participating maxima.

Necessary adjustments due to OASI Benefits shall be made effective in November, or not later than December (or by repayment in lieu of a decrease in payment within the current adjustment period). Use of conversion tables is impracticable for family groups. Therefore, counties should secure information as to the amount of OASI received in October from the families during October in order to effect the proper adjustments in the payments for November or December as was done for the October 1951 increases.

Individual Notices of Change, Forms CA 232, are required for all changes in payments.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Table III - Maximum Reimbursement Amounts for Children Eligible for Federal Participation Living with a Non-Needy Relative

Number of Children	Maximum Participation Base	State Share	County Share	Federal Share
1	\$111	\$ 61	\$30.50	\$ 19.50
2	162	85	42.50	34.50
3	207	105	52.50	49.50
4	246	121	60.50	64.50
5	279	133	66.50	79.50
6	306	141	70.50	94.50
7	327	145	72.50	109.50
8	342	145	72.50	124.50
9	351	141	70.50	139.50
10	357	135	67.50	154.50
11	363	129	64.50	169.50
12	369	123	61.50	184.50
13	375	117	58.50	199.50
14	381	111	55.50	214.50
15 or more	387	105	52.50	229.50*

*See Section F-560 of the Manual of Fiscal Policies and Procedures for federal sharing for more than 15 children.

Table IV - Maximum Reimbursement Amounts for Children Ineligible for Federal Participation Living with Relatives

Number of Children	Maximum Participation Base	State Share	County Share
1	\$111	\$ 74	\$ 37
2	162	108	54
3	207	138	69
4	246	164	82
5	279	186	93
6	306	204	102
7	327	218	109
8	342	228	114
9	351	234	117
10	357	238	119
11	363	242	121
12	369	246	123
13	375	250	125
14	381	254	127
15 or more	387	258	129

(The Manual Section will be revised as soon as possible.)

FINDING OF EMERGENCY

The attached Bulletin No. 474 is an emergency regulation. Its adoption is necessary for the immediate preservation of the public peace, health and safety or general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act Amendments of 1952, has made additional Federal assistance available to this State for Aid to the Needy Aged, Aid to the Needy Blind and Aid to Dependent Children, for a two year period commencing October 1, 1952. The Social Security Act Amendments of 1952 also increase the amount of Old Age and Survivors Insurance payments to many of the recipients of aid.

The Legislature of the State of California meeting in Special Session has adopted legislation as an urgency measure necessary for the immediate preservation of the public peace, health or safety within the meaning of Article IV of the Constitution and has provided additional State money for an increase in Aid to Needy Blind cases in which the Federal Government does not participate, and also has provided an equivalent increase in Aid to the Partially Self-Supporting Blind. The Legislature also has provided that the legislation take effect immediately so as to relieve hardship and destitution as promptly as possible. The Legislature also has adopted urgency measures providing for increases in Old Age Security payments.

There are approximately 300,000 recipients of Old Age Security, Aid to Needy Blind, Aid to Partially Self-Supporting Blind and Aid to Dependent Children whose grants of aid may be affected by the legislation above mentioned. The changes in grants cannot be accomplished under present regulations. In order for the computation of grants to be made with reasonable promptness and to effectuate the increases within a reasonable time it is necessary that this regulation take effect immediately. The giving of notice and public procedure thereon accordingly are impracticable and unnecessary and would cause delay which would be contrary to the public interest.

The regulation shall become operative October 1, 1952.

The regulation shall be effective immediately upon filing with the Secretary of State.

AREA OFFICES

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Earl Warren
Governor

STATE HEADQUARTERS

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616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

August 25, 1952

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

Dear Mr. Jordan:

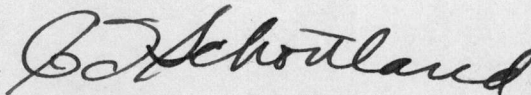
Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 472 (OAS)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 2020.001, 2025.1, and 2160 on August 13, 1952, and are being filed in accordance with Sections 11380 and 11422(b) of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest. Three copies of the "Finding of Emergency" adopted by the State Social Welfare Board on August 13, 1952 are attached.

Very sincerely yours,



Charles I. Schottland
Director

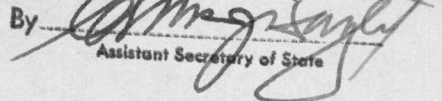
Attachments

FILED

In the office of the Secretary of State
of the State of California

AUG 25 1952 4:30 PM

FRANK M. JORDAN, Secretary of State

By 
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

L. J. Schottland
(Signature)

Director
(Title)

8/28/52
(Date)

Effective October 1, 1952, all recipients of Old Age Security (federal or non-federal cases) should receive a \$5 increase in the Old Age Security grant except for the following:

1. Those who are receiving Old Age and Survivors' Insurance income either directly or as an allocation.
2. Those who have changes in need or income other than changes occasioned by the increase in the statutory maximum grant from \$75 to \$80 or the increase in Old Age and Survivors' Insurance payments.
3. Those who are residing in a nursing home, sanitarium, or rest home and whose need is determined in accord with Manual Section A-1260, Item 3. (See Section B-3 below).

A. AUTHORIZATION PROCESS

In order that one warrant may be issued in October to cover the full amount payable for that month and so that the warrant may be delivered without delay action should be taken by the board of supervisors or its delegated agent in August or September on all changes to be effective October 1, 1952.

1. Circumstances Under Which Authorization By List is Permitted

It is not necessary to prepare individual Notice of Change documents (Form Ag 232) for recipients who receive an automatic \$5 increase. Such recipients are those who

(a) Have no income

or

(b) Their only income is from sources other than Old Age and Survivors' Insurance, and there is no known change in their need or income effective October 1, 1952, except the change in need occasioned by the increase in the statutory maximum Old Age Security grant from \$75 to \$80.

The automatic \$5 increase may be authorized in list form. If lists are used they shall show the state number, the name, the old rate, the new rate, and carry an appropriate certification and authorization signed by the County Clerk (or Deputy) or by the delegated agent of the board of supervisors. In counties using mechanical equipment, this information may be contained on two lists. The cases shall be listed in numerical order according to state number. A suggested list form is attached to this bulletin.

If lists are used the following information shall be recorded in the individual case record.

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 14, 1952

DEPARTMENT BULLETIN NO. 472 (OAS)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Old Age Security - Amendments
to Social Security Act and to the
W&I Code, Operative October 1, 1952.

The Federal Social Security Act has been amended by the adoption of Public Law No. 590 (HR 7800). Public Law No. 590 contains two important provisions which affect Old Age Security.

1. Old Age and Survivors' Insurance payments to individuals are increased effective September 1, 1952. The first payments in the increased amounts will be received shortly after October 1, 1952.
2. Federal matching base is increased from \$50 to \$55 effective October 1, 1952. This results in the maximum amount of federal participation being increased from \$30 to \$35 in a grant of \$55 or more. (See Department Bulletin 475, Changes in Fiscal Policies and Procedures effective October 1, 1952).

Amendments to the Old Age Security chapter of the W&I Code operative October 1, 1952 result in an increase in the statutory maximum Old Age Security grant from \$75 to \$80, thus making available to recipients the \$5 increase in federal participation authorized by Public Law No. 590.

Appropriate adjustments shall be made in the grants for all Old Age Security recipients to take into consideration the increased Old Age and Survivors' Insurance benefit payments and the increase in the statutory maximum Old Age Security grant from \$75 to \$80, effective October 1, 1952.

In general the amount of the grant to be effective October 1, 1952, will be computed on the basis of need and income information currently included in the individual case record. Except for "New Start" cases (See Section C below) and cases involving a minor child or children (see Circular Letter 574, Supplement, Item III), the adjusted amount of the Old Age and Survivors' Insurance income to be received in October can be determined from the amount presently received by use of the Conversion Tables released with Circular Letters 574 and 574, Supplement. It should not be necessary to contact the Old Age and Survivors' Insurance field office to secure this information.

2. Special Needs

No changes are being made in special need allowances at this time.

3. Nursing Home, Sanitarium, or Rest Home Care.

The grants for Old Age Security recipients who are residing in a nursing home, sanitarium, or rest home shall continue to be computed in accord with the provisions of Manual Section A-1260, Item 3. The maximum allowance for nursing home care shall not exceed the actual cost of the care or the ceiling allowance provided in the above section, whichever is less. The additional allowance for clothing and incidental needs remains at \$20. Any recipient currently residing in such a nursing home, sanitarium, or rest home, whose present income, together with his Old Age Security grant, is equal to his total need will receive no increase in grant effective October 1, 1952. A recipient who is residing in such nursing home and who presently has a deficiency between his need and income including his Old Age Security grant will receive an increase in his Old Age Security grant effective October 1, 1952.

C. "NEW START" OLD AGE AND SURVIVORS' INSURANCE CASES

Circular Letter No. 574 called attention to the fact that a few recipients who are primary Old Age and Survivors' Insurance beneficiaries will receive Old Age and Survivors' Insurance in amounts different from that determined by Conversion Table No. 1. More recent information received from the Federal Security Agency indicates that this group includes:

1. Primary beneficiaries who qualified under the "New Start" provisions which became effective in *January 1951 and who received OASI benefits for the first time for April 1952 or later

and

2. Secondary or other beneficiaries who receive OASI benefits based upon the record of a wage earner who qualified under the "New Start" provisions and received OASI benefits for the first time for April 1952 or later.

* Circular letter 574 erroneously referred to these provisions as being effective in September 1950.

The October OASI income for such recipients may be determined from the Conversion Tables released with Circular Letters No. 574 and 574 Supplement without regard to whether the case might be affected by the "New Start" provisions.

D. RAILROAD RETIREMENT

Circular Letter No. 571 called attention to the fact that under the provisions of HR 7800 a small number of persons now receiving income under the Railroad Retirement Act will receive an increase in the amount of pension. The increased payments will be made available as individual cases are processed and no increases are anticipated until after October.

"Aid increased to \$_____, effective October 1, 1952, per

W&IC."

At the option of the county, the date of authorization need not be shown in the case record if the county is prepared to provide the authorization date upon request.

Use of a rubber stamp is suggested in order to record the above information in the individual case record.

2. Circumstances Under Which Authorization By Notice of Change (or Similar Document) is Required

The Notice of Change (Form Ag 232), or an individual document devised by the county giving information similar to that required by the Notice of Change, must be prepared and filed in the case record for each case in which

(a) Old Age and Survivors' Insurance is received either directly or by allocation of a portion of a spouse's primary benefit

or

(b) There is change in the recipient's need and/or income other than that occasioned by the increase in the statutory maximum grant or the increase in the Old Age and Survivors' Insurance payment.

B. STANDARD OF ASSISTANCE

1. Basic Continuing Needs

Amendment to the W&I Code operative October 1, 1952, results in an increase in the statutory maximum Old Age Security grant from \$75 to \$80. The amounts within the \$80 grant for basic needs are as follows:

Food	\$28.50
Housing.	15.00
Utilities.	6.30
*Clothing	7.70
Household maintenance and replacement.	4.50
Transportation	4.50
*Incidentals.	13.50

\$80.00

*These supersede the money amounts given for incidentals and clothing in Manual Section A-1210. Section 2160e is amended operative October 1, 1952, increasing from \$10 to \$15 the maximum allowance which the department can adopt for incidental and personal expenses for persons receiving care in a private institution under a contract not specifically providing for these needs. This amendment makes the \$5 increase in maximum grant available to this group of recipients.

E. NOTIFICATION TO RECIPIENTS

Form Ag 239, Notification of Action, need not be sent to recipients who receive an automatic \$5 increase in grant. For all other cases for which grants are changed effective October 1, 1952, the usual notification shall be sent. (Manual Sections A-276 and A-1318)

All recipients who are receiving OASI shall be notified of their continued responsibility to report their income from earnings or income from any other source to the welfare department. The statement suggested in Circular Letter No. 574 may be used or a county devised statement containing the same general information may be used. Such notification shall go to the recipient not later than October 1, 1952.

F. REVISED MANUAL SECTIONS

Appropriate sections of the Manual of Policies and Procedures--OAS will be revised as soon as administratively possible to bring them into conformity with the provisions of this Bulletin.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachment

FILED
In the office of the Secretary of State
of the State of California
AUG 25 1952 4:30 PM
FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

OLD AGE SECURITY AUTOMATIC INCREASE LIST

EFFECTIVE OCTOBER 1, 1952.

The following recipients of Old Age Security are entitled to an increase in aid of five dollars (\$5.00) per month each. These increases are made to conform to the provisions of amended Title I of the Social Security Act and the Welfare and Institutions Code, effective October 1, 1952.

This list does not include cases in which there is income from Old Age and Survivors Insurance, a change in other income or a change in the recipient's need other than that occasioned by the increase in the statutory maximum payment.

Approved by the County of _____ on _____
(Date)

Authorized Signature

Name	State No.	Old Rate	New Rate
------	-----------	----------	----------

FILED

In the office of the Secretary of State
of the State of California

AUG 25 1952 4:30 PM

FRANK M. JORDAN, Secretary of State

By

John G. Taylor
Assistant Secretary of State

FINDING OF EMERGENCY

The attached bulletin re Old Age Security amendments to Social Security Act and to W&IC 2025 is an emergency regulation. Its adoption is necessary for the immediate preservation of the public peace, health and safety or general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary and contrary to the public interest.

The facts upon which these findings are based are as follows:

During recent months rapidly rising prices and monetary inflation have made the maximum amounts of public assistance payable to recipients thereof increasingly inadequate for their reasonable needs resulting in widespread hardship and suffering among such recipients.

The Congress of the United States, by the Social Security Act Amendments of 1952, has made additional federal assistance available to this State for Aid to the Needy Aged, Aid to the Needy Blind and Aid to Dependent Children, for a two year period commencing October 1, 1952. The Social Security Act Amendments of 1952 also increase the amount of Old Age and Survivors' Insurance payments to many of the recipients of aid.

The Legislature of the State of California meeting in special session has adopted legislation as an urgency measure necessary for the immediate preservation of the public peace, health or safety within the meaning of Article IV of the Constitution and has provided that the legislation take effect immediately in order to make the additional federal money available to recipients of Aid to the Aged in this State as soon as it becomes available to this State.

There are approximately 273,000 recipients of Old Age Security in this State whose grants may be affected by the legislation. Also the grants of thousands of other categorical aid recipients are to be increased effective at the same time. The changes in grants cannot be accomplished under present regulations. In order for the computation of grants to be made with reasonable promptness in approximately 300,000 cases and to effectuate the increases within a reasonable time it is necessary that this regulation which will implement the urgency measure adopted by the Legislature take effect immediately. The giving of notice and public procedure thereon accordingly are impracticable and unnecessary and would cause delay which would be contrary to the public interest.

The regulation shall become operative October 1, 1952.

The regulation shall be effective when and only when both of the following events have occurred:

1. When the bulletin has been filed with the Secretary of State, and
2. When the urgency measure adopted by the Legislature has become effective.

FILED

In the office of the Secretary of State
of the State of California

AUG 25 1952 4:30 PM

FRANK M. JORDAN, Secretary of State

By

Assistant Secretary of State

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

August 27, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 476 (ANC)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 1551, and 1560 on August 22, 1952, and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

C. I. Schottland

Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

AUG 28 1952 1103 AM

FRANK M. JORDAN, Secretary of State

By

Chas. J. Sargent
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. J. Schouten
(Signature)

Director
(Title)

8/27/52
(Date)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 26, 1952

DEPARTMENT BULLETIN NO. 476 (ANC)

TO: COUNTY WELFARE DEPARTMENTS

Subject: One Month Suspension
of Form CA 239

In order to alleviate the work pressures due to the application of the several provisions of HR 7800, the requirement for issuance of Form CA 239 (Notification of Action by the Board of Supervisors) is hereby suspended for one month.

The month selected for making this exception may be either September or October, whichever involves the heavier workload in Aid to Needy Children payments.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

FILED

In the office of the Secretary of State
of the State of California

AUG 28 1952

11:03 AM

FRANK M. JORDAN, Secretary of State

By

Edmund G. Sawyer
Assistant Secretary of State

AREA OFFICES

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Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

DIRECTOR

September 30, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Old Age Security Manual Letter No. 11 and include revisions to the following sections:

A-730	A-1210
A-735	A-1300
A-1208	A-1350

These regulations were adopted by the State Social Welfare Board on September 26, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b) and are being filed in accordance with Sections 11380, 11421(b), and 11422(c).

These regulations are effective October 1, 1952. Three copies of the "Findings of Emergency" for Sections A-730, A-735, A-1210, A-1300, and A-1350 are attached. The "Finding of Emergency" for Department Bulletin No. 477 covers Section A-1208.

Very sincerely yours,

C. I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By *Chas. I. Schottland*
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. Schouland
(Signature)

Director
(Title)

9/30/52
(Date)

OLD AGE SECURITY MANUAL LETTER NO. 11

The attached revisions numbered 67 through 76 are to be entered in your copy of the Manual of Policies and Procedures - Old Age Security and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the State Social Welfare Board on September 26, 1952, to be effective October 1, 1952.

Secs. A-730 and A-735 have been revised to exclude life and burial insurance which has no cash surrender value from consideration in determining eligibility with respect to personal property.

Secs. A-1210 and A-1300 incorporate the revised maximum grant and the revised amounts for clothing and incidentals included in the \$80 maximum. Revisions to other pertinent sections to incorporate the change in the amount of the maximum grant, and to make derived computations in examples consistent with the new maximum will be forwarded in the near future.

Sec. A-1350 has been revised to give the new maximum grant and the new federal sharing formula which increases the maximum amount of federal participation in an individual Old Age Security grant from \$30 to \$35.

In Old Age Security Manual Letter No. 10, Paragraph 3, Line 7, change the word "employed" to "ineligible".

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

RESOURCES WHICH REPRESENT PERSONAL PROPERTY

Attorney General's Opinion No. 52-68 released with Circular Letter 572 on July 23, 1952, held that burial insurance is a form of life insurance and "may not be valued at more than its present surrender value in determining the eligibility of applicants or recipients of Aged or Blind Aid."

Present rulings provide that burial insurance for which the recipient is required to make no premium payments, i.e., paid up burial insurance, shall be counted as a part of the \$1200 reserve permitted under the law. They also provide that such paid up burial insurance shall be considered to be worth its face value, not to exceed \$500. The Attorney General's Opinion, in effect, holds this ruling to be contrary to the provisions of Old Age Security and Aid to the Blind laws. Therefore, revision of the Manual provisions is deemed to be necessary.

Proposed sections A-730 and A-735, which follow, provide that no value shall be placed upon any life insurance, including paid up burial insurance, except to the extent that such insurance has a cash surrender value. Lacking a cash surrender value, no value would be placed upon any insurance carried upon the life of a recipient.

Normally these sections which were presented to the County Welfare Policy Committee on September 24, 1952, would be presented to the State Social Welfare Board in October. However, since the Attorney General has held the department rule on burial insurance to be invalid, the proposed revisions to these two sections are being submitted to the State Social Welfare Board in September.

The proposed change in rule will result in some increase in the number of applicants who will be eligible for aid. Judging by the small number of current recipients who own paid-up burial insurance (approximately 2%) the increase in eligible applicants would not be substantial.

~~(Rev.)~~

The current market value shall be determined for all items of personal property, except "personal effects." The value of personal property which is the separate property of the applicant or recipient and his share of all community personal property shall be included as personal property holdings. Personal property which is the separate property of the spouse shall not be included in the applicant's or the recipient's personal property holdings. Evidence shall be secured to establish that property purported to be the separate property of the spouse is, in fact, his or her separate property.

Each of a couple is presumed to own a one-half interest in community personal property. (For exceptions see Items 4, 5, ~~6~~ below.) Title to community property may be held jointly in the name of each of the couple, or it may be held in the name of either spouse. All personal property held in the name of the spouse of a married person is presumed to be community property but this presumption may be refuted by evidence which establishes the property as separate property.

The value of the following resources, less encumbrances of record, shall be considered when determining the total value of personal property: (See Sec. A-745, Encumbrances.)

1. Money and securities:—Cash on hand, in a bank account or safe deposit box, in postal savings, on deposit with building and loan associations or otherwise held where it is payable on demand; stocks, (except stock in a water company—See Sec. A-710, Determination of Assessed Value of Real Property, Item 10) bonds, notes, mortgages, deeds of trust, etc. (Exception: Proceeds received by an applicant or recipient from the sale of real property are considered real property for a period not to exceed 6 months from the time of receipt provided the funds are retained for the purchase of a home.) (See Sec. A-765, Conversion of Real or Personal Property.)
2. Motor Vehicles:—Vehicles of all kinds including automobiles used for necessary personal transportation. (See Sec. 735, Evaluation of Personal Property, Item 5.)
3. Life Insurance:—The cash surrender value of a policy or policies of insurance, including burial insurance, on the life of the applicant or recipient, and on the life of the spouse. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either, except when the facts establish that the cash surrender value represents the separate property of the insured. (See Sec. A-735, Evaluation of Personal Property, Item 6.)

(Section Continued on Next Page)

11. Trust Funds:-An interest in the corpus of a trust of which the applicant or recipient is beneficiary but only to the extent that the property is in fact available. (For exception see Item 5 of this section.)

The value of the following resources shall not be considered when determining the total value of personal property:

1. Personal Effects:-Clothing, household furniture and equipment, food stuffs, fuel, and personal jewelry used by the applicant or recipient or held for his future use.
2. Property in Escrow:-Funds held in an escrow account are considered unavailable as long as the escrow can be revoked only upon the consent of all parties involved and shall not be considered in determining eligibility of either the purchaser or seller until the escrow is completed.
3. Insurance with No Cash Value: Life insurance including burial insurance and similar death benefit plans which have no cash surrender value.

(W&IC 2140, 2163, 2163.1, 2163.2, 2163.6, 2165 d)

4. Burial Trust or Similar Funds:—Such funds are considered the separate property of the beneficiary. (See Sec. A-735, Evaluation of Personal Property, Item 8.)
5. Interment Plot:—Space intended to be used for interment purposes whether a plot in a cemetery, a crypt, vault, etc., shall be considered the separate property of the spouse for whom it is intended. (See Sec. A-735, Evaluation of Personal Property, Item 8.) *(Interment plots retained for profit making purposes shall be considered as real property. See Sec. A-710, Item 11.)*
6. Leases:—The lessee's interest in a lease of real property for a period of years.
7. Business Enterprise:—The value of a commercial or other business enterprise including the value of livestock and fowl, other than that retained for family use only, the value of farm equipment, etc. The current market value of furniture, household equipment, foodstuffs, or fuel which is held primarily for commercial purposes or profit.
8. Interest in Firms in Receivership:—The market value of an interest in defunct banks, building and loan associations, etc.
9. Conditional Sales Contracts:—The current market value of the equity in personal property being
 - a. purchased under contract of sale, except when the article being purchased is a "personal effect." The market value of the purchaser's equity is the difference between the current market value of the goods being purchased and the remainder due on the contract.
 - b. sold under contract of sale. The market value of the seller's equity is the current market value of the goods being sold, less the total amount the buyer has paid on the sale price (excluding interest).

In the absence of information to the contrary, it is the presumption that payments are being made regularly in accordance with the terms of the contract.
10. Undistributed Estates:—An heir's interest in an undistributed estate only if the property in the undistributed estate is in fact personal property and is available to the recipient prior to distribution. If two or more heirs have an undivided interest in such property the interest of each is considered to be in proportion to the number of known heirs.

(Section Continued on Next Page)

8. Interment Plot

Space intended for interment purposes shall be considered to have a value of \$50 irrespective of the fact that the purchase price may have exceeded this amount.

9. Business Enterprises *(Interment plots retained for profit making purposes shall be considered as real property. See Sec A-710, Item 11)*

The current market value of an applicant's interest in the stock on hand, fixtures and equipment, and the "accounts receivable" of business enterprises shall be estimated by a representative of a collection agency, a retail credit association or other organization or person qualified to make such an appraisal.

To be of value, "accounts receivable" must be valid and collectible. Their value will vary with the age of the account, the credit of the debtors and the regularity with which payments have been made. The current market value and the source through which it was determined shall be recorded in the case record.

10. Farm Equipment, Livestock and Fowl

The current market value of farm machinery and equipment, such as tractors, cultivators, etc., and livestock and fowl shall be secured from county agricultural agents, the Farm Security Administration, the Federal Land Bank, or other firms or individuals qualified to estimate the re-sale value of such holdings.

11. Uncollected Judgments

The value to a judgment creditor of an outstanding judgment against a solvent corporation shall be the amount of the judgment plus accumulated interest thereon.

if When the judgment is against other than a solvent corporation, the county shall make a complete investigation, e.g., a credit report, of the ability of the judgment debtor to pay. Determination of the market value of the judgment shall then be secured through a bank or a person qualified to make such an appraisal.

Uncollectible judgments shall not be considered in determining eligibility of the judgment creditor.

All data relating to the value of judgments including the source shall be recorded in the case record.

12. Interest in Property Transferred to Non-Profit Institution

The value of any resulting interest in real or personal property transferred to a non-profit institution shall be determined in accord with Sec. A-770, Assignment of Property to Non-Profit Institution. (W&IC 2140, 2163, 2163.4)

X

~~(Rev.)~~

Portions not relevant to change
omitted from agenda

6. Insurance

The net cash surrender value of insurance (i.e., the cash surrender value less any loans and unpaid interest thereon) shall be verified by inspecting the applicant's and spouse's (if premiums are paid from community funds) insurance policy or policies. If these documents are not available or the net cash surrender value cannot be determined by such inspection, verification shall be made through correspondence with the insurance company. The net cash surrender value of the insurance and how it was verified shall be recorded in the case record.

Annuities usually are irrevocable and have no cash or loan value. If annuities have a cash surrender value, such value shall be considered as personal property.

Burial insurance does not generally have a cash surrender or loan value during the life time of the insured. However, if the burial insurance has a cash surrender value, such value shall be considered as personal property.

Dividends which remain with the insurance company and are available to the applicant upon demand represent personal property which must be considered in determining eligibility.

Most insurance policies do not become due and payable until the death of the insured. Endowment policies, however, become payable at the expiration of a specified period. The amount payable must be included in determining personal property holdings as of the date on which it becomes payable, even though the insured may elect to leave the funds on deposit with the insurance company.

Some insurance policies specifically provide for cash selective age benefit payments at a certain age upon surrender of the insurance certificate. The amount of the cash selective benefit, which is always less than the face value of the policy, is considered to be the cash surrender value of the policy as of the date on which the insured reaches the specified age.

7. Burial Trust or Similar Funds

The amount of funds placed in a burial trust or any similar fund earmarked for burial purpose shall be included in computing total personal property holdings.

(Section Continued on Next Page)

3. Utilities--Light, water, garbage disposal, ice and fuel needed to maintain health and comfort, \$6.30. If the total amount required to meet the various utilities the recipient must use exceeds \$6.30, see Sec. A-1225.
4. Clothing--Adequate, healthful clothing, \$7.70.
5. Household Maintenance and Replacements--The occasional replacement of small items of household equipment and/or supplies, \$4.50.
6. Transportation--Carfare, or other transportation for social and ordinary shopping purposes, \$4.50. If there is extra transportation cost due to certain specific circumstances, see Sec. A-1245.
7. Incidentals--Usual expenditures for such items as hair-cuts, toilet articles, recreation, including expenses necessary to maintain normal social contact, etc., \$13.50. (W&IC 2140)

A-1300 AMOUNT OF AID

A-1300

~~(Rev.)~~

OAS shall be granted in the amount to which the applicant or recipient is eligible. The amount of the aid payment is based on the individual's income, including the value of his currently used resources (other than casual income and inconsequential resources) and his total need, including allowable special needs. If the individual has no special needs, his income is subtracted from \$80 and the difference represents the amount of the aid payment. If the individual has allowable special needs, his income is subtracted from his total need. The difference, up to a maximum of \$80, represents the amount of the aid payment.

(W&IC 2020, 2140)

A-1350 BASIS FOR FEDERAL PARTICIPATION AND ACTUAL FEDERAL SHARE

A-1350

~~(Rev.)~~

In OAS the maximum basis for federal participation is \$55. The actual federal share is: $\frac{4}{5}$ of \$25, plus $\frac{1}{2}$ of the difference between the amount paid (not counting excess over \$55) and \$25. If the grant is less than \$25, $\frac{1}{2}$ of the difference between the grant and \$25 is deducted from $\frac{4}{5}$ of \$25. The maximum federal share is \$35.

(Section Continued on Next Page)

~~(a) To conform with Chapters 16 and 18, Stats 1952 (2nd Ex. Sess) and Department Bulletin No. 472.~~

~~(b) To conform with Public Law No. 590 (HR 7800) and Department Bulletin No. 475.~~

Sections A-1210, A-1300 and A-1350

Proposed revisions to Sections A-1210, A-1300 and A-1350 merely incorporate the changes resulting from legislative action increasing the maximum grant from \$75.00 to \$80.00, effective October 1, 1952, and federal legislation increasing the amount of federal participation in OAS payments. The new amounts in the \$80.00 standard for clothing and incidentals are shown in the first section.

These sections were not presented to the County Welfare Policy Committee inasmuch as these proposed revisions merely incorporate provisions of Department Bulletins 472 and 475, issued on August 15, 1952. These bulletins were the basis for changes which have been processed by the counties to be effective October 1, 1952.

A-1210 BASIC CONTINUING NEEDS

A-1210

~~(Rev.)~~

Those basic continuing needs common to all recipients and which \$80 is presumed to meet are set forth below together with the amount of money within the \$80 which is considered to be available to meet the cost of each item. (a)

1. Food--The normal amount and kind of food needed to maintain health and vigor, \$28.50. If the recipient pays board and room, the cost thereof is ordinarily the sum of the cost of the basic needs of food, housing, utilities, and household operations. (See Sec. A-1230) If circumstances require that the recipient eat his meals in restaurants, see Sec. A-1215.
2. Housing--Rent, including no utilities, in adequate, suitable, sanitary housing in the locality chosen by the applicant or recipient, \$15. If rent, including no utilities, exceeds \$15, see Sec. A-1220.

Rent, including utilities, \$21.30 (\$15 for rent and \$6.30 for utilities). If rent, including utilities, exceeds \$21.30, see Sec. A-1220.

When the recipient occupies his own home, the cost of his housing is the sum of the monthly cost of prorated taxes, insurance, the required encumbrance payment (principal and interest), if any (see Sec. A-1280, Special Need to Meet Payment on Debts), \$2 monthly allowance for minor repair and upkeep, and any net occupancy value. When the total of these costs exceeds \$15, see Sec. A-1220.

(Section Continued on Next Page)

(a) ~~To conform with Chapters 16 and 18, Stats 1952 (2nd Ex. Sess.) and Department Bulletin No. 472.~~

X

This section is being revised in accord with the Attorney General Opinion #52/68 holding that insurance may not be valued at more than its present surrender value in determining the eligibility of applicants or recipients of Aid to the Blind. Since there is already in Section 457 provision for considering the cash surrender value of insurance, we have deleted the material relating to "burial insurance." Also, see Page 1.

B-457 TYPES OF PERSONAL PROPERTY
(Rev)

B-457

In ANB, the current market value of personal property shall be used in determining eligibility.

In APSB, the county assessed value of personal property is considered, except for cash, securities, and cash surrender value of insurance. If personal property is declared but is not listed on the local assessment rolls, it shall be referred to the county assessor to determine whether or not it is assessable, and if assessable, its assessed value. If the property is not assessable, the current market value shall be determined, and the ratio which the assessed valuation in the county bears to the market value shall be used.

It may be necessary to secure verification from appropriate sources to determine the value of certain items of property.

The following includes some of the more common types of personal property:

Items 1 and 2 not relevant to the change are omitted from the agenda

3. ~~Burial Insurance--The face value, not to exceed \$500, of paid-up insurance when it is the type of policy which is payable only at death, i.e., has no cash surrender value during the life-time of the insured. (Such burial insurance is considered the separate property of the insured.) No value shall be placed on burial insurance if premium payments are required, or as a condition to payment of a specified sum upon death, the insured must remain a member in good standing in a lodge, union or other organization with which he is insured. Such burial insurance is not "paid-up" insurance. (For exception in APSB, see Sec. B-442.)~~

(a)

Items 4 through 18 not relevant to the change are omitted from the agenda

(a) Deleted to conform to Attorney General's opinion 52/68.

The short formula for computing the federal share is: $1/2$ the amount paid (not counting excess over \$55) plus \$7.50.

Example 1: OAS grant \$65, federal basis \$55

Regular formula

$$\begin{aligned} & \frac{3}{4} \times \$25 = \$20.00 \\ & 1/2 \times (\$55 - \$25) = \$30/2 = \$15.00 \\ & \text{Federal share} = \$20 + \$15 = \$35.00 \end{aligned}$$

Short formula

$$\begin{aligned} & \text{Federal share} = \\ & (1/2 \times \$55) + \$7.50 = \$27.50 + \$7.50 = \$35.00 \end{aligned}$$

Example 2: Grant \$17, federal basis \$17

Regular formula

$$\begin{aligned} & \frac{3}{4} \times \$25 = \$20.00 \\ & 1/2 \times (\$17 - \$25) = -\$8/2 = -\$4.00 \\ & \text{Federal share} = \$20.00 - \$4.00 = \$16.00 \end{aligned}$$

Short formula

$$\begin{aligned} & \text{Federal share} = \\ & (1/2 \times \$17) + \$7.50 = \$8.50 + \$7.50 = \$16.00 \end{aligned}$$

Example 3: Grant \$4, federal basis \$4

Regular formula

$$\begin{aligned} & \frac{3}{4} \times \$25 = \$20.00 \\ & 1/2 \times (\$4 - \$25) = -\$21/2 = -\$10.50 \\ & \text{Federal share} = \$20 - \$10.50 = \$9.50 \end{aligned}$$

Short formula

$$\begin{aligned} & \text{Federal share} = \\ & (1/2 \times \$4) + \$7.50 = \$2 + \$7.50 = \$9.50 \end{aligned}$$

(SSA)

(a) To conform with Public Law No. 590 (HR 7000) and Department Bulletin No. 475.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

FINDING OF EMERGENCY

Revised Sections A-730 and A-735 of the Old Age Security Manual of Policies and Procedures are emergency regulations. Their adoption is necessary for the immediate preservation of the general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary and contrary to the public interest.

The facts on which these findings are based are as follows:

The personal property reserve of an applicant for, or recipient of Old Age Security may not exceed \$1200 after encumbrances of record have been deducted; in the case of a couple the value of their combined personal property may not exceed \$2000 after encumbrances of record have been deducted.

The existing departmental rule requires that the face value of paid up burial insurance, not to exceed \$500, be included in the \$1200, and \$2000 maxima. Such burial insurance policies generally have no cash surrender value during the life of the insured.

Attorney General's Opinion 52-68 states that burial insurance is a form of life insurance and since W & I Code Section 2163 provides that no life insurance shall be valued at more than its present cash surrender value, the existing rule is held to be contrary to the provisions of the law.

Sections A-730 and A-735, as revised, bring the regulations into conformity with the legal requirements. Their adoption as an emergency regulation is necessary in order that the rule will conform to the law and so that persons whose resources are such that they meet the requirements of the law will not be denied aid on the basis of a rule which has been held to be contrary to the expression of the Legislature.

These regulations shall become operative October 1, 1952.

These regulations shall be effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 HSB

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

FINDING OF EMERGENCY

Revised Sections A-1210, A-1300, and A-1350 of the Old Age Security Manual of Policies and Procedures are emergency regulations. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional Federal assistance available to this State for the Aid to Needy Aged, Aid to the Needy Blind and Aid to Dependent Children for a two year period commencing October 1, 1952.

The Legislature of the State of California, meeting in the second extraordinary session in August 1952, adopted legislation as an emergency measure and provided that the legislation take effect immediately so that the additional Federal money could be made available to recipients of aid in this State as soon as it becomes available to this State.

In order that the change in grants of approximately 273,000 recipients of Old Age Security could be made effective October 1, emergency regulations were adopted by the Social Security Board and issued in Department Bulletins 472 and 475, effective October 1, 1952.

Existing Manual Sections A-1210, A-1300, and A-1350 also contain rules and regulations of the department. They are now in conflict with the regulations set forth in Department Bulletins 472 and 475. It is therefore necessary that the revisions to these sections become operative October 1, 1952 thus removing any conflict with the regulations in Department Bulletins 472 and 475.

These regulations shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

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Governor

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STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

September 30, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Fiscal Manual Letter No. 2 and include revisions to the following sections:

F-560	F-710	F-760
F-570	F-730	F-770
F-640	F-750	F-790

These regulations were adopted by the State Social Welfare Board on September 26, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, and 114(b) and are being filed in accordance with Sections 11380, 11421(b), and 11422(c).

These regulations are effective October 1, 1952. Three copies of each "Finding of Emergency" are attached.

Very sincerely yours,

C. I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 4 50 PM

FRANK M. JORDAN, Secretary of State

By

John G. Meyer
Assistant Secretary of State

Certified as a Regulation (or
as Regulations of the

Dept of Social Welfare
(Name of State Agency)

L. J. Schouland
(Signature)

Director
(Title)

9/30/52
(Date)

FISCAL MANUAL LETTER NO. 2

The attached revisions numbered 1 through 54 are to be entered in your copy of the Manual of Fiscal Policies and Procedures and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the State Social Welfare Board on September 26, 1952, to be effective October 1, 1952.

Secs. F-560, F-570, and F-640 have been revised to incorporate the new amounts for the maximum grants and sharing formulae.

Secs. F-710, F-730, F-750, F-760, F-770, and F-790 have been revised to include procedure with respect to the new federal formula period.

Attached is a revised page for the Table of Contents and a revised list of forms. New Form AB, CA 802A is added and the following forms are replaced by revised forms:

Form Ag, Bl, CA 800
Form AB, CA 802
Form Ag, Bl, CA 809
Form AB, CA 816
Form ABC 820

Department Bulletin No. 475 is now obsolete.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

Department Bulletins 472, 473 and 475

These Bulletins were adopted by the State Social Welfare Board on

August 13, 1952, and released to the Counties on August 14, 1952.

Inasmuch as these Bulletins were adopted prior to the date when the Governor signed the legislation which they implemented, they are at this time presented to the Board merely for ratification. (Copies of the Agenda as forwarded to the county representatives did not include copies of these Bulletins inasmuch as all counties have received them).

The revisions in Sections F-560, F-570, F-710, F-730, F-750, F-760, F-770, F-790, which follow, are proposed in order to incorporate in the Manual of Fiscal Policies and Procedures those revisions necessitated by the enactment of Public Law 590, Chapters 16 and 18, statutes of 1952, second extraordinary session and Department Bulletin 475 which deal with increased federal participation by the Federal Government and increased grants to recipients of assistance. Inasmuch as these changes merely incorporate material which was released in department bulletins on August 15, 1952, the sections were not presented to the County Welfare Policy Committee.

F-560 CHARTS OF FINANCIAL PARTICIPATION IN GRANTS OF AID

F-560

(Rev.)

FILED

In the office of the Secretary of State
of the State of California

Old Age Security

SEP 30 1952 450 P

PERIOD COVERED	MAXIMUM GRANT	MAXIMUM FEDERAL BASIS	RATIO OF PARTICIPATION			FRANK M. JORDAN, Secretary of State Assistant Secretary of State
			FEDERAL SHARE	STATE SHARE	COUNTY SHARE	
10/1/52 thru 9/30/54	\$80	\$55	1/2 up to \$55, plus \$7.50	6/7 of Remainder	1/7 of Remainder	X
7/1/50 thru 9/30/52	75	50	1/2 up to \$50, plus \$5	6/7 of Remainder	1/7 of Remainder	
1/1/49 thru 6/30/50	75	50	1/2 up to \$50, plus \$5	Remainder	None	
10/1/48 thru 12/31/48	65	50	1/2 up to \$50, plus \$5	6/7 of Remainder	1/7 of Remainder	
8/1/47 thru 9/30/48	60	45	1/2 up to \$45, plus \$2.50	6/7 of Remainder	1/7 of Remainder	
10/1/46 thru 7/31/47	55	45	1/2 up to \$45, plus \$2.50	5/6 of Remainder	1/6 of Remainder	
7/1/43 thru 9/30/46	50	40	1/2 up to \$40	5/6 of Remainder	1/6 of Remainder	
1/1/40 thru 6/30/43	40	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder	
4/1/36 thru 12/31/39	35	30	1/2 up to \$30	1/2 of Remainder	1/2 of Remainder	
9/15/35 thru 3/31/36	35	0	None	1/2 of Grant	1/2 of Grant	
1/1/30 thru 9/14/35	30	0	None	1/2 of Grant	1/2 of Grant	

Regular cases (Code R) - Shares are computed according to the chart.

Non-federal cases (Code X) - The state and county participate in the total amount of the grant up to the maximum grant according to their respective ratios.

Non-county, non-federal cases (Code S) - The state pays the total amount of the grant.

Non-county cases (Code N) - The state pays the remainder of the grant after deducting the federal share.

(Section Continued on Next Page)

(a) To conform with Chapt. 16 and 18, Stats. 1952 (2nd Ext. Sess),
Public Law No. 590 (HR 7800), and Dept. Bul. 475.

(Continued)

F-560 (Continued)

F-560

Aid to Partially Self-supporting Blind Residents (Continued)

PERIOD COVERED	MAXIMUM GRANT	RATIO OF PARTICIPATION*	
		STATE SHARE	COUNTY SHARE
3/1/47 thru 9/30/47	\$65	1/2 of Grant	1/2 of Grant
9/15/45 thru 2/28/47	60	1/2 of Grant	1/2 of Grant
7/1/41 thru 9/14/45	50	1/2 of Grant	1/2 of Grant

*There are no Regular (Code R) or Non-county (Code N) cases as there is no federal participation in APSB.

Non-federal cases (Code X) - State and county shares are computed according to the chart.

Non-county, non-federal cases (Code S) - The state pays the total amount of the grant.

Aid to Needy Children (Voucher)

PERIOD COVERED	MAXIMUM STATE BASIS*		MAXIMUM FEDERAL GRANT	RATIO OF PARTICIPATION		
	REGULAR CASES	NON-FEDERAL CASES		FEDERAL SHARE	STATE SHARE	COUNTY SHARE
10/1/52 thru 9/30/54	1 child \$111 2 children 162 3 children 207 4 children 246 5 children 279 6 children 306 7 children 327 8 children 342 9 children 351 plus \$6 for each additional ANC child in family budget unit, not to exceed maximum of \$387.	Same as Regular Cases	\$30 for needy relative, \$30 for first ANC child, \$21 for each additional ANC child in family budget unit.	1/2 up to maximum Federal basis, plus \$4.50 for needy relative and \$4.50 for each child.	2/3 of remainder	1/3 of Remainder
10/1/51 thru 9/30/52	1 child \$105 2 children 153 3 children 195 4 children 231 5 children 261 6 children 285 7 children 303 8 children 315 9 children 321 plus \$3 for each additional ANC child in family budget unit, not to exceed maximum of \$339.	Same as Regular Cases	\$27 for needy relative, \$27 for first ANC child, \$18 for each additional ANC child in family budget unit.	1/2 up to maximum Federal basis, plus \$3 for needy relative and \$3 for each child.	2/3 of Remainder	1/3 of Remainder
10/1/50 thru 9/30/51	\$16.50 for needy relative, \$88.50 for first ANC child, \$48 for each additional ANC child in family budget unit.	\$72 for first ANC child, \$36 for each additional ANC child in family budget unit.	\$27 for needy relative, \$27 for first ANC child, \$18 for each additional ANC child in family budget unit.	1/2 up to maximum Federal basis plus \$3 for needy relative and \$3 for each child.	2/3 of Remainder	1/3 of Remainder

* Any amount paid over the maximum state basis is county supplemental aid.
(Section Continued on Next Page)

(a) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.

Aid to Needy Blind

PERIOD COVERED	MAXIMUM GRANT	MAXIMUM FEDERAL BASIS	RATIO OF PARTICIPATION		
			FEDERAL SHARE	STATE SHARE	COUNTY SHARE
10/1/52 thru 9/30/54	\$90	\$55	1/2 up to \$55, plus \$7.50	3/4 of Remainder	1/4 of Remainder
7/1/50 thru 9/30/52	85	50	1/2 up to \$50, plus \$5	3/4 of Remainder	1/4 of Remainder
1/1/49 thru 6/30/50	85	50	1/2 up to \$50, plus \$5	Remainder	None
10/1/48 thru 12/31/48	80	50	1/2 up to \$50, plus \$5	3/4 of Remainder	1/4 of Remainder
10/1/47 thru 9/30/48	75	45	1/2 up to \$45, plus \$2.50	3/4 of Remainder	1/4 of Remainder
3/1/47 thru 9/30/47	65	45	1/2 up to \$45, plus \$2.50	1/2 of Remainder	1/2 of Remainder
10/1/46 thru 2/28/47	60	45	1/2 up to \$45, plus \$2.50	1/2 of Remainder	1/2 of Remainder
9/15/45 thru 9/30/46	60	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
1/1/40 thru 9/14/45	50	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
7/1/36 thru 12/31/39	50	30	1/2 up to \$30	1/2 of Remainder	1/2 of Remainder
8/14/29 thru 6/30/36	50	0	None	1/2 of Grant	1/2 of Grant

Regular cases (Code R) - Shares are computed according to the chart.

Non-federal cases (Code X) - The state and county participate in the total amount of the grant up to the maximum grant according to their respective ratios.

Non-county cases (Code N) - The state pays the remainder of the grant after deducting the federal share.

Non-county, non-federal cases (Code S) - The state pays the total amount of the grant.

Aid to Partially Self-supporting Blind Residents

PERIOD COVERED	MAXIMUM GRANT	RATIO OF PARTICIPATION*	
		STATE SHARE	COUNTY SHARE
10/1/52 thru 9/30/54	\$90	5/6 of Grant	1/6 of Grant
2/1/49 thru 9/30/52	85	5/6 of Grant	1/6 of Grant
10/1/47 thru 1/31/48	75	5/6 of Grant	1/6 of Grant

*There are no Regular (Code R) or Non-county (Code N) cases as there is no federal participation in APSB.

(Section Continued on Next Page)

- (a) To conform with Chap. 25, Stat. 1952, (2nd Ex. Sess.), Public Law 590 (HR 7800), and Dept. Bul. 475.
- (b) To conform with Chap. 24, Stats. 1952 (2nd Ex. Sess.), and Dept. Bul. 475.

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(Rev.)

The following detail for federal, state, and county sharing in individual cases is provided for informational purposes only. In claiming, the participating shares are not computed for individual cases but in totals only for each monthly claim.

A. FEDERAL SHARE

In OAS and ANB, the maximum basis for federal participation in the current formula period beginning October 1, 1952, is \$55. The maximum federal share is \$35. (For prior federal formulae periods see Sec. F-560.) The formula for computing the federal share in individual OAS and ANB grants is: 1/2 the amount paid, not counting excess over \$55, plus \$7.50.

Example A - OAS grant \$80 or ANB grant \$90

Computation of federal share:

$$(1/2 \times \$55) \text{ plus } \$7.50 = \$35.00$$

Example B - OAS or ANB grant \$17

Computation of federal share:

$$(1/2 \times \$17) \text{ plus } \$7.50 = 16.00$$

Example C - OAS or ANB grant \$4

Computation of federal share:

$$(1/2 \times \$4) \text{ plus } \$7.50 = 9.50$$

In ANC, when determining the maximum basis on which the federal share is computed, the total grant to a family budget unit is considered. In the current formula period beginning October 1, 1952, (see Sec. F-560 for prior periods) the maximum federal basis in each family budget unit is \$30 for one child plus \$21 for each additional child, plus \$30 for one needy eligible relative.

If there is one eligible child in a family budget unit and no needy eligible relative, the maximum basis for federal participation is \$30. If there is a needy eligible relative and one eligible child in the family budget unit, the maximum basis for federal participation is \$60. If there are two eligible children in the family budget unit and no needy eligible relative, the maximum basis for federal participation is \$51. If there is a needy eligible relative and two eligible children in the family budget unit, the maximum basis for federal participation is \$81, etc.

The formula for computing the federal share is: 1/2 the amount paid, not counting excess over \$30 for a needy eligible relative, \$30 for one child, and \$21 for each additional eligible child in the family budget unit, plus \$4.50 for each such eligible person.

(Section Continued on Next Page)

~~(a) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~

~~(b) To conform with Chaps. 16, 18, and 25, Stats. 1952 (2nd Ex. Sess.) and Dept. Bul. 475.~~

PERIOD COVERED	MAXIMUM STATE BASIS*		MAXIMUM FEDERAL BASIS	RATIO OF PARTICIPATION		
	REGULAR CASES	NON-FEDERAL CASES		FEDERAL SHARE	STATE SHARE	COUNTY SHARE
10/1/48 thru 9/30/50	\$88.50 for first ANC child, \$48 for each additional ANC child in family budget unit.	\$72 for first ANC child, \$36 for each additional ANC child in family budget unit.	\$27 for first ANC child, \$18 for each additional ANC child in family budget unit.	$\frac{1}{2}$ up to maximum federal basis plus \$3 for each child.	2/3 of remainder	1/3 of remainder
10/1/47 thru 9/30/48	\$85.50 for first ANC child, \$45 for each additional ANC child in family budget unit.	\$72 for first ANC child, \$36 for each additional ANC child in family budget unit.	\$24 for first ANC child, \$15 for each additional ANC child in family budget unit.	$\frac{1}{2}$ up to maximum federal basis plus \$1.50 for each child.	2/3 of remainder	1/3 of remainder
10/1/46 thru 9/30/47	\$36 for first ANC child, \$31.50 for each additional ANC child in family budget unit.	\$22.50 for each child.	\$24 for first ANC child, \$15 for each additional ANC child in family budget unit.	$\frac{1}{2}$ up to maximum federal basis plus \$1.50 for each child.	2/3 of remainder	1/3 of remainder
1/1/40 thru 9/30/46	\$31.50 for first ANC child, \$28.50 for each additional ANC child in family budget unit.	\$22.50 for each child.	\$18 for first ANC child, \$12 for each additional ANC child in family budget unit.	$\frac{1}{2}$ up to maximum federal basis.	2/3 of remainder	1/3 of remainder
10/1/39 thru 12/31/39	\$28.50 for first ANC child, \$26.50 for each additional ANC child in family budget unit.	\$22.50 for each child.	\$18 for first ANC child, \$12 for each additional ANC child in family budget unit.	1/3 up to maximum federal basis.	2/3 of remainder	1/3 of remainder
7/1/36 thru 9/30/39	\$20 for each ANC child in family budget unit.	\$20 for each child.	\$18 for first ANC child, \$12 for each additional ANC child in family budget unit.	1/3 up to maximum federal basis.	1/2 of remainder	1/2 of remainder
Prior to 7/1/36	None.	\$10 for each child.	None.	None.	Total grant.	None.

*Any amount paid over the maximum state basis is county supplemental aid.

Regular Cases (Code R) - Federal, state, and county shares are computed according to the chart. Exclude county supplemental aid.

Non-federal Cases (Code X) - The state and county participate in the total amount of the grant (excluding county supplemental aid) according to their respective ratios.

Non-county Cases (Code N) - The state pays the remainder of the grant (excluding county supplemental aid) after deducting the federal share.

Non-county, non-federal Cases (Code S) - The state pays the total amount of the grant (excluding county supplemental aid).

The remainder of this section not relevant to the change is omitted from the agenda.

X

Example K - ANB grant	\$ 90.00	(X)
Less federal share.	35.00	(X)
	<u>55.00</u>	
State share $\frac{3}{4}$	41.25	
County share $\frac{1}{4}$	13.75	

In APSB cases with county residence the state share is $\frac{5}{6}$ and the county share $\frac{1}{6}$ of the aid paid. There is no federal participation in APSB.

Example L - APSB grant.	\$ 90.00	(X)
State share $\frac{5}{6}$	75.00	
County share $\frac{1}{6}$	15.00	

In ANC regular cases, within the state maximums, the state share is $\frac{2}{3}$ and the county share $\frac{1}{3}$ after deducting the federal share.

Example M - ANC grant (excluding county supplemental) \$162.00	(X)
Federal share (See Example G)	54.00
	<u>108.00</u>
State share $\frac{2}{3}$	72.00
County share $\frac{1}{3}$	36.00

In OAS, ANB, and ANC cases having the required county residence but not eligible for federal participation (Non-federal cases), the state and county participate in the full grant (within the state maximums) in the ratios indicated above.

In OAS, ANB, and ANC cases eligible for federal participation but not having county residence (Non-county cases), the state pays the full grant (within the state maximums) after deducting the federal share.

In OAS, ANB, and ANC cases ineligible for federal participation not having county residence and in all APSB cases not having county residence (Non-county-Non-federal cases), the state pays the full amount of the grant (within the state maximums).

(W&IC 1510, 1511, 1553, 1554, 2020, 2021, 2186, 2187, 3025, 3042, 3084, 3087, 3087.1, 3420, 3432, 3472, 3480; FSA)

~~(a) To conform with Chap. 25, Stats. 1952 (2nd Ex. Sess.) and Dept. Bul. 475.~~

~~(b) To conform with Chap. 24, Stats. 1952 (2nd Ex. Sess.) and Dept. Bul. 475.~~

~~(c) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~

Example D - One eligible child - grant \$111, federal basis \$30
Computation of federal share:

$$(1/2 \times \$30) \text{ plus } (1 \text{ person} \times \$4.50) = \$19.50$$

Example E - Eligible relative and one eligible child - grant \$111, federal basis \$60 (\$30 for relative, \$30 for child)

Computation of federal share:

$$(1/2 \times \$60) \text{ plus } (2 \text{ persons} \times \$4.50) = \$39.00$$

Example F - Two eligible children, no eligible relative - grant \$162, federal basis \$51 (\$30 for first child and \$21 for second child)

Computation of federal share:

$$(1/2 \times \$51) \text{ plus } (2 \text{ persons} \times \$4.50) = \$34.50$$

Example G - Eligible relative and two eligible children - grant \$162, federal basis \$81 (\$30 for relative, \$30 for first child, \$21 for second child)

Computation of federal share:

$$(1/2 \times \$81) \text{ plus } (3 \text{ persons} \times \$4.50) = \$54.00$$

Example H - Three eligible children, no eligible relative - grant \$50, federal basis \$50 (federal basis can not exceed the amount of the grant)

Computation of federal share:

$$(1/2 \times \$50) \text{ plus } (3 \text{ persons} \times \$4.50) = \$38.50$$

Example I - Eligible relative and three eligible children - grant \$15, federal basis \$15

Computation of federal share:

$$(1/2 \times \$15) \text{ plus } (4 \text{ persons} \times \$4.50) = \$25.50$$

B. STATE AND COUNTY SHARES

In OAS regular cases the state share is 6/7 and the county share 1/7 of the aid paid after deducting the federal share.

Example J - OAS grant.	\$ 80.00	(X)
Less federal share	35.00	(X)
	45.00	
State share 6/7.	38.57	
County share 1/7	6.43	

In ANB regular cases the state share is 3/4 and the county share 1/4 of the aid paid after deducting the federal share.

(Section Continued on Next Page)

~~(a) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~

~~(b) To conform with Chaps. 16 and 18, Stats. 1952 (2nd Ex. Sess.) and Dept. Bul. 475.~~

G. REPORT OF REPAYMENT, FORM ABC 808

This form, required in original only, provides for computation of the distribution of individual repayments of aid according to governmental sharing formulas. Its detail supports the contra roll for repayments in the current formula period or the schedule of repayments for prior formula periods and voluntary repayments for all periods. All pertinent data for which provision is made on the form shall be provided for each individual repayment.

H. SCHEDULE OF ADJUSTMENTS, FORMS AB, CA 816

These forms, required in original only, are used by the county to effect the necessary corrections in the current claim or in claims for prior months. The form is also used by the SDSW in making state adjustments of county claims for prior months.

(W&IC 116, 1556, 1556.5, 1560, 2140, 2189, 3075, 3087.3, 3460, 3482)

F-730 CLAIMING OF AID PAYMENTS

F-730

~~(Rev.)~~

Subsection A not relevant to the change
and is omitted from this agenda.

B. CLAIMS FOR PRIOR MONTHS

Payments for prior months shall be grouped on the payroll according to month. Numbering and totaling of prior months payrolls shall be done as described above for current month payrolls. OAS, ANB, and ANC voucher payrolls shall be grouped and totalled separately for months within the current federal formula period beginning October 1, 1952, and the prior federal formula period October 1, 1948 through September 30, 1952.

Subsection C not relevant to the change
and is omitted from the agenda

D. BASIS FOR STATE PARTICIPATION - ANC

1. Voucher Aid Payrolls, Form CA 801

The basis for state participation is the amount shown on the chart in Sec. F-560 or the warrant amount, whichever is the lesser. If all of the ANC children in a family budget unit do not have a common status with respect to county residence and no separate authorization is made for the child or children who do not have one year of county residence, the basis for state participation is allocated as follows:

(Section Continued on Next Page)

~~(a) Adaptation of procedure to include new formula period.~~

~~(Rev.)~~

Monthly claims for categorical aid payments are prepared on the following forms:

A. CERTIFICATION, FORMS AG, BL, CA 800

These forms are required in triplicate and provide the certification of county officials upon which claims are approved for payment or credited against advances. They shall be signed by the county welfare director and the county auditor or auditor-controller.

B. CLAIM SUMMARY SHEET, FORMS AB, CA 802

These forms are required in triplicate and summarize claims for individual items detailed on the aid payrolls, contra rolls, and schedules of adjustment for the current formula periods. The totals are transferred to Lines 1, 2, and 3 of the certification form.

C. OAS, ANB, ANC VOUCHER CLAIM SUMMARY SHEET, FORMS AB, CA 802A

These forms, required in triplicate, summarize claims for individual items detailed on the OAS, ANB, or ANC voucher aid payrolls, contra rolls, and schedules of adjustment applying to the federal formula period October 1, 1948 through September 30, 1952. The totals are transferred to Line 4 of the certification form.

D. RECONCILIATION STATEMENT, FORM ABC 820

This form, required in triplicate, is prepared from batch voucher controls as provided in Sec. F-240 and is to be signed by the welfare director or county auditor depending upon which office maintains the reconciliation controls and prepares the statement.

E. AID PAYROLLS AND CONTRA ROLLS, FORMS AB, CA 801 AND CA 801-BHI

These forms are required in original only or legible first copy. Those retained in the county (see Sec. F-210) shall be exact duplicates. The information provided for on the SDSW prescribed payroll and contra roll forms is the minimum information required. Any special county forms shall contain all of the information required by the state forms and shall not be used by a county prior to specific written approval of the SDSW.

F. SCHEDULE OF REPAYMENTS, FORM ABC 803

This form, required in original only, is used for reporting voluntary repayments for all periods and repayments of aid applying to federal formula periods prior to October 1, 1948. (APSB prior to October 1, 1947, and ANC-BHI prior to October 1, 1939.) The totals are transferred directly to the appropriate lines of the certification form.

(Section Continued on Next Page)

(a) Clarification

~~(b) Adaptation of procedure to include new formula period.~~

Example B - A person who became blind while a resident of the state moves to the county with intent to reside on January 1. ANB is granted to begin on April 1 on a non-county basis. Six months of county residence is acquired on July 1, and the county assumes its share of the aid on July 1.

In ANC, if one or more children of a family group have non-county status and the remaining children have regular status, the \$30 basis for federal participation is allocated to a child having regular status. The non-county children are considered "second" children and the maximum federal basis for each child is \$21. If there is a needy eligible relative the \$30 federal basis is included with the group having regular status. (See F-730-D for allocation of state basis.)

F. PAYMENTS FOR PARTIAL MONTHS

1. Computation of Total Amount

In computation of a grant for a partial month, the rate of aid per day is computed on the basis of the actual number of days in the particular month involved including the beginning day of aid and the day of discontinuance.

Example A - OAS in the amount of \$75 a month begins on November 4. Aid for 27 days is paid ($27/30 \times \$75$), making a total payment of \$67.50.

Example B - ANC-BHI in the amount of \$60 a month is paid through February 24 during a 29 day month. Aid for 24 days ($24/29 \times \$60$), results in a total payment of \$49.66.

2. Bases for State and Federal Participation

If a partial month's claim is made, the bases for both state and federal participation are the actual amount of aid paid, the basis amounts not to exceed the maximum for a full month. Federal and state participation maxima are not prorated.

Example A - If 20 days aid at the rate of \$65 in a 30 day month, or \$43.33, is paid to an OAS recipient, \$43.33 is the basis for state and federal participation.

Example B - If 25 days aid at the rate of \$80 in a 30 day month, or \$66.67, is paid to an ANB recipient, \$66.67 is the basis for state participation and \$55 is the basis for federal participation.

(Section Continued on Next Page)

~~(a) Existing policy contained in old manual Sec. 627-30, omitted from the new manual. Also to conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~

~~(b) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~

- a. The state basis shall be divided proportionately among the ANC persons, unless federal participation is affected as stated in b.

Example - A family budget unit consists of three children and a needy eligible relative. One child does not have one year of county residence. The grant is \$160 for the four persons. One fourth, \$40, is allocated to the child without county residence, and three-fourths, \$120, to the other three persons.

- b. If, by using the method prescribed in a, the amount allocated to persons having regular status is less than the maximum amount in which the federal government participates, the federal maximum basis (including \$30 for a first child and \$30 for an eligible relative) is allocated to the persons having regular status. The balance is allocated to the child or children not having county residence.

Example - A family budget unit consists of five children and a needy eligible relative. Three of the children have regular status. Two children have no county residence. The total grant for the family is \$134. Of this grant \$102 (the federal basis for 3 eligible children and a needy eligible relative) is allocated to the 4 persons having regular status. The balance of \$32 is allocated to the two children having no county residence.

Item 2 of Subsection D not relevant to change and is omitted from this agenda

E. NON-COUNTY OR NON-COUNTY NON-FEDERAL CASES

In cases which have been receiving aid on a non-county or non-county non-federal basis, and county residence of one year is acquired during a month (six months for ANB and APSB recipients who became blind while residents of the state), the county shall assume its share of the aid beginning with the following month. If the required county residence is completed on the first day of a month, the county shall assume its share of the aid beginning with the first day of the month.

Example A - The residence of an aged person or a child was established on January 15. OAS or ANC is granted to begin on June 1 on a non-county basis. One year of county residence is acquired on January 15 of the next year. Reimbursement is claimed on a non-county basis for the full month of January, the county assuming its share of the aid beginning February 1.

(Section Continued on Next Page)

advance and on January 1 the mother is paid for 28 days in the amount of \$112 ($28/31 \times \124). The state basis is claimed only on the voucher claim in the maximum amount of \$111. (X)

Example C - Transfer from BHI to relative during month. Relative paid maximum for partial month. A child living in a boarding home is moved on January 4 to his mother's home, where aid is granted in the amount of \$124 a month from January 4. The mother is paid for 28 days in the amount of \$112 ($28/31 \times \124). The state basis is claimed on the voucher claim only in the maximum amount of \$111. (X)

- b. If less than the maximum state basis is paid in advance to the relative for the full month, or if less than the maximum is paid in advance or during the month for a partial month and a payment is also made to a boarding home, the claiming of the maximum reimbursement of state funds is divided between the voucher and BHI claims. The voucher claim should show the total amount paid to the relative and the regular bases for federal (if eligible for federal) and state participation for the full month, not to exceed the amount actually paid. The BHI claim should show the warrant amount paid to the boarding home or institution; however, the basis for state participation should be only in an amount necessary to effect the maximum state reimbursement in both payments for the month, not to exceed the amount actually paid. If such transfers occur, the maximum state basis for family budget units applies (Sec. F-560), except that the basis for state participation on the BHI claim for the partial month shall not exceed \$60.

Example D - Transfer from relative to BHI. Full month paid in advance to relative less than maximum. A child living with the mother is receiving aid in the amount of \$67.50 a month. On January 16 the child is moved to a boarding home and the payment is increased to \$77.50. On January 1 a warrant is issued to the mother for the full month in the amount of \$67.50. At the end of the month a warrant is issued to the boarding home for 16 days aid in the amount of \$40 ($16/31 \times \77.50). The total amount of \$67.50 paid to the mother is shown on the voucher claim as the basis for state participation. Only \$43.50 state basis (\$111 maximum state basis less \$67.50 allowed on the voucher claim) may be claimed on the BHI claim. (X)

Example E - Transfer from relative to BHI. Partial month paid to relative in advance - less than maximum. A child living with the mother is receiving aid in the amount of \$66 a month. On January 6 the child is moved to a

(Section Continued on Next Page)

(a) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.

Example C - If 17 days aid at the rate of \$75 in a 30 day month, or \$42.50, is paid to an APSB recipient, \$42.50 is the basis for state participation.

Example D - If 15 days aid at the rate of \$75 in a 31 day month, or \$36.29, is paid for a child in a boarding home, \$36.29 is the basis for state participation.

Example E - If 25 days aid at the rate of \$150 in a 31 day month, or \$120.97, is paid for one child ineligible for federal participation, \$111 is the basis for state participation.

Example F - If 10 days aid at the rate of \$95 in a 31 day month, \$30.65, is paid for three children eligible for federal, \$30.65 is the basis for both state and federal participation.

Example G - If 17 days aid at the rate of \$100 in a 31 day month, or \$54.84, is paid for three children, two of whom are eligible for federal, \$54.84 is the state basis and \$51 is the federal basis.

3. Computation of ANC Payments and Basis for State Participation in Transfers Between the Home of a Relative and a Boarding Home or Institution.

If a child is moved from the home of a relative to a boarding home or institution (or vice versa) during a month, ANC shall be computed and claimed as follows:

- a. If an amount equaling or exceeding the maximum state basis is paid in advance to the relative for the full month, or if an amount paid in advance or during the month to the relative for a partial month equals or exceeds the maximum allowable for a full month, a full month's aid is allowed on the voucher claim. No state basis is claimed on the BHI cash claim for that month.

Example A - Maximum for full month paid in advance to relative. A child is living with his mother and the monthly ANC payment of \$111 is paid to the mother on January 1. On January 25, the child is placed in a boarding home. The state basis is claimed only on a voucher claim in the maximum amount of \$111.

Example B - Maximum for partial month paid in advance to relative. A child living with his mother and receiving aid at the rate of \$124 a month is to be placed in a boarding home on January 29. The change is known in

(Section Continued on Next Page)

January 13, and is also eligible for federal participation. The basis for state participation is increased to \$170 and ANC is continued at that rate. One warrant in the amount of \$170 is issued. The basis for state participation for the month of January is \$170 and the federal basis is \$72.

Example C - Two children eligible for federal participation (relative not needy) are receiving ANC in the amount of \$100 on January 1. The family grant is increased to \$120 on January 14, when aid is approved to begin for an additional child of the family, who is also eligible for federal participation. The method of arriving at the total payment for the month is as follows:

13 days @ \$100	\$41.93
18 days @ \$120	69.68
Total basis for state participation.	\$111.61

On the first of the month, one warrant is drawn in the amount of \$100 for the first two children and in the middle of the month, a supplemental warrant in the amount of \$11.61 is issued to cover the increase for the third child. The basis for federal participation is \$51 in the first warrant of \$100 issued for the first two children and \$21 in the supplemental warrant for \$11.61 issued for the additional child, or a total of \$72 for the three children.

G. TWO OR MORE ANC FAMILY BUDGET UNITS IN ONE HOUSEHOLD

1. Two or More Family Budget Units in the Same Household and There is a Different Payee for Each Family Budget Unit.

Federal participation is available on the basis of the amount paid up to maxima of \$30 for each needy eligible relative, \$30 for one eligible child in each family budget unit, and \$21 for each of the additional eligible children in each family budget unit. State participation is allowed up to the maximum state basis for each family budget unit.

2. All of the Children in a Household are in the Care and Control of One Person or the Aid for All of the Children in the Household is Paid to One Person.

Federal participation is allowed on the basis of the amount paid up to maxima of \$30 for the needy eligible relative, \$30 for only one eligible child, and \$21 for each additional eligible child in

(Section Continued on Next Page)

- (a) ~~To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.~~
 (b) ~~Existing policy. Added for clarification.~~

boarding home and the grant is decreased to \$60. This change is known in advance and on January 1 a warrant is issued to the mother for 5 days aid in the amount of \$10.65 ($5/31 \times \66). At the end of the month a warrant is issued to the boarding home for 26 days aid in the amount of \$50.32 ($26/31 \times \60). The total amount of \$10.65 paid to the mother is shown on the voucher claim as the basis for state participation. The total amount of \$50.32 paid to the boarding home is shown on the BHI claim as the basis for state participation, since the total of the two payments does not exceed the maximum of \$111 for the family budget unit, and the amount paid to the boarding home is within the BHI maximum of \$60. (X)

Example F - Transfer from BHI to relative. Partial month paid to relative less than the maximum. Partial month paid to BHI over maximum. A child is living in a boarding home where aid is being paid at the rate of \$84 a month. On January 26 the child is moved to his mother's home where aid is granted in the amount of \$95.50 a month effective January 26. Two warrants are issued, one to the boarding home for 25 days aid in the amount of \$67.74 ($25/31 \times \84) and one to the mother for 6 days aid in the amount of \$18.48 ($6/31 \times \95.50). The total amount of the payment of \$18.48 made to the mother is shown on the voucher claim as the basis for state participation. Only \$60 state basis may be claimed on the BHI claim, since the warrant amount of \$67.74 exceeds the BHI maximum of \$60.

4. Computation of ANC Claim When an Additional Child Becomes Eligible for Aid During the Month.

Federal participation for the full month is allowed for an additional child of a family receiving ANC for whom aid is approved to begin during the month, if such child meets all federal requirements of eligibility.

Example A - Two children eligible for federal participation (relative not needy) are receiving aid at the rate of \$100 on January 1. Aid is approved to begin on January 14 for an additional child of the same family who is also eligible for federal participation. Aid continues at the rate of \$100 and the basis for federal participation for the three children is \$72. (X)

Example B - Two children eligible for federal participation (relative not needy) are receiving aid in the amount of \$170 (\$162 basis for state participation and \$8 county supplemental aid). An additional child becomes eligible for ANC on (X)

(Section Continued on Next Page)

Items 1a and 1b of Subsection B are not relevant to the change and are omitted from this agenda

c. Repayments Including County General Relief or ANC Supplemental Aid

The distribution is computed on a "claimed-less-adjusted-claim" basis as in the following examples:

Example C - An OAS recipient (federally eligible) received \$60 a month for March and April 1948 (prior formula period). Because of special needs, the county paid to him from its general relief funds an additional \$40 a month. In each of these months he received income of \$75, resulting in a total overpayment of \$150 which he reported to the county several months later. \$105 was repaid. Since this repayment applies to a prior formula period, the individual shares are computed on Form ABC 808 as follows:

	Total Amount	Federal Excess	Federal Share	State Share	County Share	County Supp. Aid	Fed. Elig. Persons County
	(1)	(3)	(4)	(5)	(6)	(7)	(8)
A. For Month of March 1948							
B. Paid-Regular (\$100.00)	\$60.00	\$15.00	\$25.00	\$30.00	\$5.00	\$40.00	1
C. Less: Adjusted Payment After this Repay- ment	25.00	-0-	15.00	8.57	1.43	-0-	1
D. Distribution of Repayment (\$75.00)	\$35.00	\$15.00	\$10.00	\$21.43	\$3.57	\$40.00	-0-
A. For Month of April 1948							
B. Paid-Regular (\$100.00)	60.00	15.00	25.00	30.00	5.00	40.00	1
C. Less: Adjusted Payment After This Repayment (\$70.00)	60.00	15.00	25.00	30.00	5.00	10.00	1
D. Distribution of Repayment (\$30.00)	\$ -0-	\$ -0-	\$ -0-	\$ -0-	\$ -0-	\$30.00	-0-
F. Total Repayment (\$105.00)	\$35.00	\$15.00	\$10.00	\$21.43	\$3.57	\$70.00	-0-

The principle illustrated in Example C for OAS also applies to a repayment in similar circumstances of any of the categorical aids.

(Section Continued on Next Page)

(a) Change in example necessary to illustrate correct reporting.

the household. State participation is based on the maximum state basis for the number of children in the household. These maxima apply regardless of whether there is more than one family budget unit in the household and regardless of whether more than one warrant is issued. (X)

Subsections H, I, and J not relevant to change and are omitted from this agenda

(W&IC 116, 1510, 1511, 1512, 1552.2, 1552.3, 1553, 1554, 1556, 1556.5, 1559, 1560, 2020, 2021, 2140, 2183, 2186, 2187, 2189, 2200, 2222.7, 3025, 3075, 3084, 3087.1, 3087.3, 3420, 3432, 3460, 3472, 3480, 3482; FSA)

F-750 REPORTING OF REPAYMENTS
(Rev)

F-750

Subsection A not relevant to change is omitted from this agenda

B. DISTRIBUTION OF REPAYMENTS

The distribution of repayments as to participating bases and shares is computed on Form ABC 808, Report of Repayment, as follows:

1. Repayments Receivable and In Lieu Repayments

Repayments receivable and in lieu repayments (see Sec. F-400) to be reported are applied as grant adjustments to individual months in the over-payment period, beginning with the first month and applying to subsequent months in succession. The entries on Form ABC 808 on Line B "As Claimed" and on Line C "Less: Adjusted claim after this repayment" are computed in the same manner as aid payments are claimed. The entries on Line D "Distribution of repayment" including persons count, are computed by subtracting the entries on Line C from the entries on Line B. The federal, state, and county shares of repayments applicable to periods in the current formula periods and the federal formula period 10/1/48 through 9/30/52 are not shown on Form ABC 808 in Columns 4, 5, 6, and 7 since the participating shares are computed on a total basis on the claim summary sheets for all elements of the monthly claim. Thus only Items 1, 2, 3, and 8 shall be completed for repayments applicable to these periods. For repayments applicable to prior formula periods, (see Sec. F-750-C.2) all columns of Form ABC 808 shall be completed since the individual shares on each repayment are listed on Form ABC 803, Schedule of Repayments, from which the totals are transferred to the appropriate lines and columns of the claim certification. (X)

(Section Continued on Next Page)

- (a) To conform with Public Law No. 590 (HR 7800) and Dept. Bul. 475.
- (b) Existing policy. Added for clarification.
- (c) Adaptation of procedure to include new formula period.

successive month, beginning with the first month of the period. The "adjusted claim" (Line C on Form ABC 808) for each successive month should be reduced to -0- before applying any portion of the repayment to a subsequent month.

Example F - An OAS recipient (federally eligible) receiving \$75 a month had personal property in excess of \$1,200 from January through May 1952. Repayment of \$165, the largest amount by which his personal property holdings were excessive, was made. A Form ABC 808 is prepared as follows:

	Total Amount (1)	Federal Excess (3)	Fed. Elig. Persons Count (8)
A. For Month of January 1952			
B. As Claimed - Regular	\$ 75.00	\$25.00	1
C. Less: Adjusted Claim After This Repayment	-0-	-0-	-0-
D. Distribution of Repayment	\$ 75.00	\$25.00	1
A. For Month of February 1952			
B. As Claimed - Regular	\$ 75.00	\$25.00	1
C. Less: Adjusted Claim After This Repayment	-0-	-0-	-0-
D. Distribution of Repayment	\$ 75.00	\$25.00	1
A. For Month of March 1952			
B. As Claimed - Regular	\$ 75.00	\$25.00	1
C. Less: Adjusted Claim After This Repayment	60.00	10.00	1
D. Distribution of Repayment	\$ 15.00	\$15.00	-0-
F. Total Repayment	\$165.00	\$65.00	2

Subsection B2 is not relevant to the change and is omitted from this agenda

C. REPORTING OF REPAYMENTS ON CLAIMS

1. Reporting on Contra Rolls

Repayments for the current formula periods and the federal formula (b) period 10/1/48 through 9/30/52 (excluding voluntary repayments)

(Section Continued on Next Page)

~~(a) Existing policy. Added for clarification.~~

~~(b) Adaptation of procedure to include new formula period.~~

In ANC-BHI cases, repayments must be applied to each individual child in the same manner in which payments are claimed.

Example D - An ANC-BHI case, consisting of two children, received \$72 for one child and \$48 for the second for the month of May 1948. A delinquent contribution was received from the father, \$7.50 for each child. The distribution on Form ABC 808 is computed as follows:

	Total Amount (1)	State Basis (2)	State Share *(5)	County Share *(6)	County Supp. Aid *(7)
A. For month of May 1948					
B. As Claimed 1st Child (Non-federal)	\$72.00	\$72.00	\$48.00	\$24.00	-0-
C. Less: Adjusted Claim After this repayment	64.50	64.50	43.00	21.50	-0-
D. Distribution of Re- payment	\$ 7.50	\$ 7.50	\$ 5.00	\$ 2.50	-0-
A. For month of May 1948					
B. As Claimed 2nd child (Non-federal)	\$48.00	\$36.00	\$24.00	\$12.00	\$12.00
C. Less: Adjusted Claim After this repayment	40.50	36.00	24.00	12.00	4.50
D. Distribution of Re- payment	\$ 7.50	\$ -0-	\$ -0-	\$ -0-	\$ 7.50
F. Total Repayment	\$15.00	\$ 7.50	\$ 5.00	\$ 2.50	\$ 7.50

* (Columns 5, 6, and 7 are not completed on Form ABC 808 for ANC-BHI repayments applying to the current formula period beginning October 1, 1939, but are shown in this example to illustrate the complete distribution of funds.)

Item 1d of Subsection B is not relevant to the change and is omitted from this agenda

e. Repayments Due to Excess Personal Property

If a repayment due to excess personal property is less than the total amount of aid the recipient received while possessed of excess property, the amounts repaid should not be pro-rated over all the months during the period of ineligibility, but should be applied to the total amount paid for each

(Section Continued on Next Page)

- (a) Existing policy. Added for clarification.
(b) Clarification.

(Rev.)

A. ADJUSTMENTS FOR THE CURRENT AND PRIOR MONTHS

Form AB, CA 816, Schedule of Adjustments, shall be used to make necessary claim adjustments to correct individual cases, including erroneous payments as defined in Sec. F-460, included on the current month's payrolls and contra rolls rather than to change individual items and page totals. The same form shall be used to effect necessary adjustments in claims for prior months. In setting up the individual corrections on Form AB, CA 816, the entire item, as it appears on the payroll, is first entered as a minus item in red or parenthesis. The item as it should be claimed is then entered as a plus item showing all the detail that should have been shown on the payroll. To adjust contra roll items, the same procedure is followed except that the credits and debits are reversed.

Separate schedules shall be prepared for OAS, ANB, and ANC voucher adjustments covering months within the current federal formula period beginning October 1, 1952, and the prior federal formula period October 1, 1948, through September 30, 1952.

Subsection B of this section not relevant to changes is omitted from the agenda.

(W&IC 116, 1512c, 1559, 1560, 2140, 2189, 3075, 3087.3, 3460, 3482)

F-770 PREPARATION OF CLAIM SUMMARY DOCUMENTS

F-770

(Rev.)

A. CLAIM SUMMARY SHEETS, FORMS AB, CA 802, and AB, CA 802A

The Claim Summary Sheets covering the current formula periods, and the federal formula period October 1, 1948, through September 30, 1952, accumulate in the appropriate lines and columns the persons counts and warrant, bases, and excess amounts from the totals of each payroll, contra roll, and schedule of adjustments applicable to each formula period. From the net totals federal, state, and county shares are computed according to participation status for entry on the Claim Certification, Form Ag, Bl, CA 800.

Subsection B not relevant to the change and is omitted from the agenda.

C. RECONCILIATION STATEMENT, FORM ABC 820

The Reconciliation Statement demonstrates on a total basis that each categorical aid claim includes only amounts authorized to be paid by the county board of supervisors or its duly appointed agent(s). It is to be signed by the county welfare director or by the county auditor depending upon which office maintains the reconciliation controls required in Sec. F-240. The signature certifies that adequate records are available in the county to support the figures included on the statement.

(Section Continued on Next Page)

~~(a) Adaptation of procedure to include new formula period.~~

~~-X-~~

are listed from the individual Forms ABC 808 on Contra Rolls (Form AB, CA 801 and CA 801 BHI) in state number order, showing the same information required on the payroll for aid payments (see Item A, Sec. F-730), as well as the month(s) to which each repayment applies.

OAS, ANB, and ANC voucher repayment contra rolls shall be grouped and totalled separately for months within the current federal formula period beginning October 1, 1952, and the prior federal formula period October 1, 1948 through September 30, 1952.

The distribution on the contra rolls shall be taken from Line F of the individual Forms ABC 808, Columns 1, 2, 3, and 8 as applicable.

2. Reporting on Schedule of Repayments

- a. All repayments applicable to the following formula periods, excluding voluntary repayments, are listed from the individual Forms ABC 808, Line F, by formula period on Form ABC 803, Schedule of Repayments. From that form the totals are carried forward to the appropriate lines and columns of the claim certification, Form Ag, Bl, CA 800.

OAS, ANE, ANC voucher	10/1/46 through 9/30/48
OAS, ANB, ANC voucher	Prior to 10/1/46
APSB	Prior to 10/1/47
ANC-BHI	Prior to 10/1/39

- b. Voluntary repayments for all formula periods are carried forward to Form ABC 803, Schedule of Repayments, from Line F of the individual Forms ABC 808. From Form ABC 803, the totals are transferred to the claim certification, Form Ag, Bl, CA 800, Line 7, Columns C, G, H, and J as special items to be deducted from the totals in those columns. No provision is made on Form Ag, Bl, CA 800 for voluntary repayments since there are very few repayments which fall within this category.

- c. Installment repayments begun prior to October 1946. Installment repayments are still being made which were begun prior to October 1946. At that time such payments were computed on a percentage basis in the same manner as prescribed in this section for voluntary repayments. Any installment repayments received for such cases shall continue to be computed on a percentage basis until the overpayment has been repaid in full. Such items will be transferred from individual Forms ABC 808 to a Form ABC 803, Schedule of Repayments, and treated as a special item on the claim certification in the same manner as prescribed above for voluntary repayments.

(W&IC 116, 1504, 1506, 1560, 2007, 2024, 2140, 2222, 2223, 2223.5, 2224, 3007, 3075, 3088, 3406, 3460, 3474; FSA; AGO 48/44)

~~(a) Adaptation of procedure to include new formula period:~~

event, a note or letter shall be mailed with the claim documents to indicate that the reconciliation statement will be forwarded separately (specify date).

One complete set of each separate claim (OAS, ANB, APSB, ANC, ANC-BHI) prior to transmittal to the SDSW shall be segregated and, depending upon bulk, shall be fastened together in the following order:

1. Certification, Forms Ag, Bl, CA 800
2. Claim Summary Sheets, Forms AB, CA 802, and AB, CA 802A (X)
3. Reconciliation Statement, Form ABC 820
4. Report of Repayment, Form ABC 808
5. Main Payroll
6. Supplemental payrolls for the current month
7. Supplemental payrolls for prior months
8. Contra rolls for current cancelations
9. Contra rolls for prior cancelations
10. Contra rolls for repayment of aid
11. Schedule of Repayments, Form ABC 803
12. Schedule of Adjustments, Forms AB, CA 816

The second and third sets of the summary documents, Forms Ag, Bl, CA 800; AB, CA 802, and AB, CA 802A; ABC 820, shall each be fastened together and transmitted with the complete claim. (X)

(W&IC 116, 1559, 1560, 2140, 2189, 3075, 3087.3, 3460, 3482)

~~(a) Adaptation of procedure to include new formula period.~~

(b) Adaptation of procedure to include new formula period.

(c) Adaptation of procedure to include new formula period.

(d) Adaptation of procedure to include new formula period.

(e) Adaptation of procedure to include new formula period.

(f) Adaptation of procedure to include new formula period.

(g) Adaptation of procedure to include new formula period.

(h) Adaptation of procedure to include new formula period.

(i) Adaptation of procedure to include new formula period.

(j) Adaptation of procedure to include new formula period.

(k) Adaptation of procedure to include new formula period.

(l) Adaptation of procedure to include new formula period.

(m) Adaptation of procedure to include new formula period.

(n) Adaptation of procedure to include new formula period.

(o) Adaptation of procedure to include new formula period.

(p) Adaptation of procedure to include new formula period.

(q) Adaptation of procedure to include new formula period.

(r) Adaptation of procedure to include new formula period.

(s) Adaptation of procedure to include new formula period.

(t) Adaptation of procedure to include new formula period.

(u) Adaptation of procedure to include new formula period.

(v) Adaptation of procedure to include new formula period.

(w) Adaptation of procedure to include new formula period.

(x) Adaptation of procedure to include new formula period.

(y) Adaptation of procedure to include new formula period.

(z) Adaptation of procedure to include new formula period.

Only amounts authorized to be paid shall be included in Items 1 through 9 of the statement. The entries in Item 10 shall be the amounts actually paid during the month. If there is a difference between the amounts in Items 9 and 10c, this difference shall be stated in Item 11 and shall be explained adequately either below Item 11 or on a separate sheet. X

Proper procedure requires that the reconciliation control totals be maintained and verified currently as authorizations are approved, resulting in predetermined totals controlling the amounts of aid to be paid and claimed each month. This procedure enables detection of under- or over-payments before warrants are released. It also serves as a signal that there are errors in the aid claims which should be located and corrected, if possible, prior to transmittal of the claim to the SDSW.

(W&IC 116, 1559, 1560, 2140, 2189, 3075, 3087.3, 3460, 3482)

F-790 PACKAGING AND TRANSMITTAL OF AID CLAIMS

F-790

~~(Rev.)~~

All claims filed with the state for aid payments shall be forwarded by the counties so as to be received by central office of the SDSW not later than the 10th of the month immediately following the month of claim. The ability of the state to prepare quarterly statements of expenditure for the federal government within the required deadline, which is necessary to assure timely monthly advances of federal moneys to the counties, depends upon prompt transmittal of county claims.

All claims shall be addressed to SDSW, 616 K Street, Sacramento 14, Attention: Bureau of County Claims. Statistical reports and material for other bureaus or divisions of the central office shall not be packaged with claims. Insofar as is possible, each claim shall be transmitted completely at one time in one package. Parts of claims may be submitted separately if:

1. Because of bulk, payrolls for aid claims are sent by express rather than by mail. If payrolls are sent by express, the Certification, Form Ag, Bl, CA, 800, Claim Summary Sheets, Forms AB, CA 802, and AB, CA 802A, and Reconciliation Statement, Form ABC 820, shall be transmitted by first class mail. A statement shall be included with the mailed documents identifying the material shipped by express and the shipping date. X
2. It is not possible to obtain signatures promptly on the certification forms. In this event, an unsigned completed certification (one copy) shall accompany the claim with a note or letter explaining that the signed copies (in triplicate) are to be mailed later (specify date).
3. It is not possible to reconcile the claim in time to enable transmittal by the 10th of the month. The reconciliation statement may be forwarded later rather than holding up the entire claim. In that

(Section Continued on Next Page)

~~(a) Clarification~~

~~(b) Adaptation of procedure to include new formula period.~~

X

Net Increases

Average Monthly Increase	4
Total cases on aid during December	95
Add: Average monthly increase of 4 cases per month	
Estimated number to receive aid for January	99
Estimated number to receive aid for February	103
Estimated number to receive aid for March	107
Estimated number to receive aid for April	111
Estimated number to receive aid for May	115
Estimated number to receive aid for June	119

The monthly amounts may be estimated by an increase of four recipients each month, or the total of all three months (345) may be divided equally.

	<u>First Month</u>	<u>Second Month</u>	<u>Third Month</u>
Number of Recipients	111	115	119
or			
Number of Recipients	115	115	115

ANC - Items 1, 2, 3, 4, and 5

The same procedure suggested for OAS, ANB, and APSB may be followed to estimate Item 1, Number of Children Eligible for Federal Participation, Item 2, Number of Needy Relatives Eligible for Federal Participation, and Item 4, Number of Children Not Eligible for Federal Participation. Item 3 on Form CA 809 is the sum of Items 1 and 2; Item 5 is the sum of Items 3 and 4.

B. AVERAGE PAYMENT

In estimating the average payment, which shall not include county supplementation (Item 2, Forms Ag, Bl 809 and Item 6, Form CA 809), the number of recipients and the amount of expenditures for the latest three month period may be used except when legislative enactment renders these numbers and amounts inapplicable. For example, when preparing the OAS estimate for the

(Section Continued on Next Page)

~~(a) Change in example required since Public Law No. 590 and amended State Laws become effective on 10/1/52.~~

~~(b) Clarification.~~

~~Revisions are proposed in the Chapter on Estimates and Advances in order to provide for increased grants and federal participation pursuant to Public Law 590 and 1952 statutes. In accordance with the provisions of Section F-630, estimates for the quarter January through March 1953 are due to be submitted to the State Department of Social Welfare by October 15, 1952. In order to insure that these estimates of state and federal grants will be computed correctly and remittances of funds to the counties may be made in adequate amounts, it is requested that these revisions be adopted as emergency regulations to become effective immediately upon filing with the Secretary of State.~~

F-640 INSTRUCTIONS FOR PREPARATION OF QUARTERLY ESTIMATES

F-640

(Rev.)

The following instructions for compiling Forms Ag, Bl, APSB, CA 809 are combined because of the similarity of reports.

In the APSB program the Federal Government does not share in either aid or administration.

Children living in boarding homes or institutions (ANC cash claims) shall not be included on the ANC Estimate of Quarterly Expenditures, Form CA 809. The children ineligible for federal participation to be reported on this form shall include only those children for whom ANC is claimed in the Voucher Claim. (See Sec. F-700)

A. TOTAL NUMBER OF RECIPIENTS

The estimated number of recipients should be as accurate as possible. The estimate shall be based on existing laws and trends, and allowance shall be made accordingly for the anticipated increase or decrease in caseload.

The following is an example of a method which may be used to estimate the total number of recipients:

OAS, ANB, APSB - Item 1

In preparing estimates for the April - June Quarter, the number of recipients for the months of September, October, November, and December may be used to determine the caseload trend.

<u>Month</u>	<u>Number of Recipients</u>	<u>Net Increases</u>
September	83	
October	87	4
November	92	5
December	95	3
Total		12

(Section Continued on Next Page)

~~(a) Change in example required since Public Law No. 590 and amended State Laws become effective on 10/1/52.~~

Example:

<u>Month</u>	<u>Total Aid Paid</u>	<u>Amount of Excess</u>
October	\$378,291.26	\$115,076.28
November	378,126.11	115,030.96
December	<u>379,000.62</u>	<u>115,291.00</u>
Total	\$1,135,417.99	\$345,398.24

$$\$345,398.24 \div \$1,135,417.99 = 30.42\%$$

If the estimated total aid for the first month was \$418,900, the aid in excess of \$55 per recipient would be \$418,900 x .3042 or \$127,429.38.

E. FEDERAL PARTICIPATION BASE

OAS, ANB - Item 5

The entry for Item 5, Federal Participation Base, is the difference between total aid (Item 3) and aid in excess of \$55 per recipient (Item 4).

Example:

	<u>OAS</u>	<u>ANB</u>
Total Aid (Item 3, first month)	\$418,900	\$18,860
Excess (Item 4)	<u>127,429</u>	<u>7,360</u>
Federal Participation Basis (Item 5)	\$291,471	\$11,500

ANC - Item 9

The Federal Government participates in ANC payments up to \$30 for one child, \$21 for each additional eligible child in the same family budget unit, and \$30 for each eligible needy relative.

Information from the latest report on Form CA 237-FG Monthly Statistical Report on ANC, may be used in estimating the federal participating base. If 43% of the children were "first" children in the family budget unit, the federal participating base for this group can not exceed \$30 times 43% of the number of eligible children (Item 1). The federal participating base for the remainder of the eligible children (57% of Item 1) can not exceed \$21 times 57% of the number of eligible children. The federal participating base for eligible needy relatives (Item 2) is computed at \$30 each.

(Section Continued on Next Page)

(a) ~~Change in example required since Public Law No. 590 (HR 7800) and amended State Laws become effective on 10/1/52.~~

(b) ~~To conform to Public Law No. 590 (HR 7800) and Department Bulletin No. 475.~~

April - June quarter, determine the average amount paid to OAS recipients for the combined months of October, November, and December.

<u>Month</u>	<u>Number of Recipients</u>	<u>Total Aid Paid</u>
October	4,133	\$314,108.00
November	4,188	318,413.64
December	4,199	319,165.99
Total	12,520	Total \$951,687.63

$\$951,687.63 \div 12,520 = \$76 = \text{Average payment}$

For ANC the estimated average payment (Item 6) is the average for all children and eligible needy relatives shown in Item 5.

C. TOTAL AID

OAS and ANB - Item 3, APSB - Item 2

The estimated total aid is equal to the total number of recipients multiplied by the estimated average payment.

ANC - Item 7

The estimated total aid is the estimated total of all children and eligible needy relatives (Item 5) multiplied by the estimated average payment (Item 6).

ANC - Item 8, Aid to Children Ineligible for Federal Participation

The aid not subject to federal participation (Item 8) may be estimated as follows: multiply the number of children not eligible for federal participation (Item 4) by the estimated average payment. Item 8 shall not include aid to eligible children in excess of the federal matching base.

D. OAS AND ANB IN EXCESS OF \$55

The maximum basis for federal participation in OAS and ANB is \$55 for each federally eligible recipient. The amount of aid in excess of \$55 is the "excess" (Item 4, Forms Ag, Bl 809). For the purpose of the quarterly estimate, all OAS and ANB recipients may be considered federally eligible.

In estimating the amount in excess of federal participation (Item 4), expenditures for the latest three month period may be used to determine what percentage of the total aid paid was in excess of \$55 per recipient except when legislative enactment renders these amounts inapplicable.

(Section Continued on Next Page)

- ~~(a) Change in example required since Public Law No. 590 (HR 7800) and amended State Laws become effective on 10/1/52.~~
- ~~(b) To conform to Chapters 16 and 18, Stats. 1952 (2nd Ex. Sess)~~
- ~~(c) To conform with Public Law No. 590 (HR 7800) and Department Bulletin No. 475.~~
- ~~(d) Clarification~~

Example:

$$\begin{array}{rclcl}
 \$7.50 \times \text{Item 1} & = & \$7.50 \times 5,900 & = & \$ 44,250.00 \\
 1/2 \text{ of Item 5} & = & \$291,471 \div 2 & = & \underline{145,735.50} \\
 \text{Item 7} & = & & = & \$189,985.50
 \end{array}$$

ANC - Item 13

To determine the estimated federal funds for aid (Item 13), multiply the total eligible children and needy relatives (Item 3) by \$4.50 and add to that product one-half of the federal participation base (Item 9).

Example:

$$\begin{array}{rclcl}
 \$4.50 \times \text{Item 3} & = & \$4.50 \times 1,530 & = & \$ 6,885 \\
 1/2 \text{ of Item 9} & = & \$35,208 \div 2 & = & \underline{17,604} \\
 \text{Item 13} & = & & = & \$24,489
 \end{array}$$

H. TOTAL FEDERAL FUNDS ESTIMATED

For OAS and ANB, Item 9, Total Federal Funds Estimated, is the sum of Item 7, Federal Funds for Aid, and Item 8, Federal Funds for Administration.

For ANC, Item 15, Total Federal Funds Estimated, is the sum of Item 13, Federal Funds for Aid, and Item 14, Federal Funds for Administration.
(W&IC 1560, 2140, 3075, 3460)

Example:First Month

Item 1, Number of Children Eligible for Federal Participation	1,190
Item 2, Number of Needy Relatives Eligible for Federal Participation	<u>340</u>
Item 3, Total Eligible Children and Needy Relatives	1,530

If there were, for example, 1,190 eligible children in 512 family units, the number of first children constitutes 43% of the number of children and the number of additional children constitutes the remainder, or 57%. The federal participating base is computed as follows:

First children	43% of 1,190 x \$30	=	\$15,360 15,351
Additional children	57% of 1,190 x \$21	=	14,238 14,244
Needy relatives	340 x \$30	=	<u>10,200</u>
Total federal participating base (Item 9)		=	\$39,798 39,795

F. FEDERAL FUNDS FOR ADMINISTRATION

The Administrative Expenditures Worksheets, Form DFA 64, should be used as a guide in estimating the amount of administrative expenditures.

For OAS and ANB (Forms Ag, B1 809) enter the estimated total administrative expenditures under Item 6. For ANC (Form CA 809) enter the estimated expenditures subject to federal matching under Item 10 and the estimated expenditures not subject to federal matching under Item 11. Item 12 is the total of the amounts in Items 10 and 11.

For OAS and ANB, Item 8, Federal Funds for Administration, is one-half of the amount reported in Item 6, Total Administrative Expenditures.

For ANC, Item 14, Federal Funds for Administration, is one-half of the amount reported in Item 10, Administration Subject to Federal Matching.

G. FEDERAL FUNDS FOR AID

The short formula for determining the federal share of OAS, ANB, and ANC grants for each recipient is stated in Sec. F-570.

OAS, ANB - Item 7

To determine the estimated federal funds for aid (Item 7) multiply the number of recipients (Item 1) by \$7.50 and add to that product one-half of the federal participating base (Item 5). The amount of federal funds for aid can not exceed \$35 times the estimated total number of recipients shown in Item 1.

(Section Continued on Next Page)

(a) ~~To conform to Public Law No. 590 (HR 7800) and Department Bulletin No. 475.~~

FINDING OF EMERGENCY

Revised Section F-640 of the Manual of Fiscal Policies and Procedures is an emergency regulation. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional Federal assistance available to this State for the Aid to Needy Aged, Aid to the Needy Blind and Aid to Dependent Children for a two year period commencing October 1, 1952.

The Legislature of the State of California, meeting in the second extraordinary session in August 1952, adopted legislation as an emergency measure and provided that the legislation take effect immediately so that all or part of the additional Federal money could be made available to recipients of aid in this State as soon as it becomes available to this State.

Existing Manual Section F-640 is in conflict with Federal and State laws effective October 1, 1952. In order that estimates to be submitted by the counties for the quarter beginning January 1, 1953 and subsequent quarters may be correctly computed it is necessary that the revision to Section F-640 become effective immediately. Estimates for the quarter beginning January 1, 1953 are due in the State Department of Social Welfare not later than October 15, 1952.

This regulation shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

FINDING OF EMERGENCY

Revised Sections F-560, F-570, F-710, F-730, F-750, F-760, F-770, and F-790 of the Manual of Fiscal Policies and Procedures are emergency regulations. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional Federal assistance available to this State for the Aid to Needy Aged, Aid to the Needy Blind and Aid to Dependent Children for a two year period commencing October 1, 1952.

The Legislature of the State of California, meeting in the second extraordinary session in August 1952, adopted legislation as an emergency measure and provided that the legislation take effect immediately so that all or part of the additional Federal money could be made available to recipients of aid in this State as soon as it becomes available to this State.

In order that the change in grants could be made effective October 1, emergency regulations were adopted by the Social Welfare Board and issued in Department Bulletin 475, effective October 1, 1952.

Existing Manual Sections contain rules and regulations of the department which are now in conflict with the regulations set forth in Department Bulletin 475. It is therefore necessary that the revisions to these sections become operative October 1, 1952 thus removing any conflict with the regulations in Department Bulletin 475.

These regulations shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

AREA OFFICES

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MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

DIRECTOR

September 30, 1952

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

Dear Mr. Jordan:

Attached are three copies of regulations which will be issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 479 (Merit System)

These regulations were adopted by the State Social Welfare Board on September 25, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 119.5, and 119.6 and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

C. I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By *Adm. Stanley*
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. S. Schouland
(Signature)

Director
(Title)

9/30/52
(Date)

PROPOSED REVISION TO MINIMUM QUALIFICATIONS
(To be effective October 1, 1952)
SOCIAL WORK SUPERVISOR I

Education: Equivalent to graduation from college.

AND

Experience: Three years of full-time paid employment as a social case worker of which one year within the last ten years must have been in work involving the determination of eligibility for aid or services.

OR

Alternate Education and Experience Requirement:

- (1) One year of full-time paid employment as a social case worker may be substituted for one year of college on a year for year basis to four years.
- (2) The successful completion of one year of graduate study at a recognized school of social work may be substituted for one year of the required experience. Maximum allowable substitution for graduate study: two years of graduate study for two years of experience.

SOCIAL WORK SUPERVISOR II

EITHER I

One year as a Social Work Supervisor I or an equivalent class.

OR II

Education: Equivalent to graduation from college,

AND

Experience: Four years of full-time paid employment as a social case worker including: (a) one year of employment in a public assistance agency within the last ten years in work involving the determination of eligibility for aid or services; and (b) two years within the last five years in a supervisory, administrative, or consultative capacity.

OR

Alternate Education and Experience Requirement:

- (1) One year of full-time paid employment as a social case worker may be substituted for one year of college on a year for year basis to four years.

CHARLES I. SCHOTTLAND
Director

EARL WARREN
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

DEPARTMENT BULLETIN NO. 479 (Merit System) (PROPOSED)

TO: COUNTY WELFARE DIRECTORS
(Excluding Alameda, Contra Costa,
Fresno, Los Angeles, Sacramento,
San Bernardino, San Diego,
San Francisco, San Mateo,
Santa Clara, and Ventura.)

Subject: Revision in Minimum
Qualifications for
Social Work Super-
visor I and Social
Work Supervisor II

Attached are the revised minimum qualifications for the
classes of Social Work Supervisor I and Social Work Supervisor II
as approved by the State Social Welfare Board on September 25, 1952.
These changes under the experience pattern of the minimum qualifications
will now require that qualifying experience shall have been as a social
case worker, instead of as a social worker under the previous pattern.
The changes in minimum qualifications for both of these classes are
shown by underscoring.

These changes in minimum qualifications shall become effective
on October 1, 1952. All employees who were occupying positions on a
provisional basis prior to October 1, 1952, will be permitted to par-
ticipate in the next scheduled County Merit System examination for the
classes of Social Work Supervisor I and Social Work Supervisor II on
the basis of the minimum qualifications in effect for both of these
classes at the time of their provisional appointment. All provisionals
appointed on or after October 1, 1952, and all other applicants for
the next scheduled examinations for either of these two classes, will
be obliged to meet the new minimum qualifications.

FILED

In the office of the Secretary of State
of the State of California

Very sincerely yours,

FRANK M. JORDAN, Secretary of State

Charles I. Schottland
Director

By *[Signature]*
Assistant Secretary of State

Attachment

- (2) The successful completion of one year of graduate study at a recognized school of social work may be substituted for one year of the required experience. Maximum allowable substitution for graduate study: two years of graduate study for two years of experience.

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Earl Warren
Governor

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GILBERT 2-4711
616 K STREET
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STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

September 30, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Aid to Needy Children Manual Letter No. 19.

These regulations were adopted by the State Social Welfare Board on September 26, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b) and are being filed in accordance with Sections 11380, 11421(b), and 11422(c).

These regulations are effective October 1, 1952. Three copies of the "Finding of Emergency" are attached.

Very sincerely yours,

C. I. Schottland
Charles I. Schottland
Director

Attachments

In the _____ of the State

SEP 30 1952 450 P

FRANK :

By *[Signature]* Secretary of State
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. J. Schoutland
(Signature)

Director
(Title)

9/30/52
(Date)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

September 29, 1952

AID TO NEEDY CHILDREN MANUAL LETTER NO. 19

The attached revisions numbered 183, 184, and 185 are to be entered in your copy of the Manual of Policies and Procedures - Aid to Needy Children and the revision numbers canceled on the inside of the manual cover.

These revisions and additions were adopted by the State Social Welfare Board on September 26, 1952, to be effective October 1, 1952.

Sec. C-512 incorporates the revised amounts for the maximum participation base and sharing formulae.

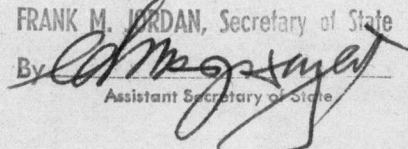
Department Bulletin No. 474 is now obsolete.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By 
Assistant Secretary of State

C-512 FINANCIAL PARTICIPATION IN ASSISTANCE PAYMENTS

C-512

(For more complete statement, see Chapter V of the Manual of Fiscal Policies and Procedures)

For each child eligible for ANC, the California law provides that there shall be paid the sum specified in the following table, or so much thereof as is necessary for the adequate care of the child living with a relative.

Table I -- Maximum Participation Base for Children Living With a Parent or Other Relative

Number of eligible children in the same home	Maximum Participation Base
1	\$111
2	162
3	207
4	246
5	279
6	306
7	327
8	342
9	351
10	357
11	363
12	369
13	375
14	381
15 or more	387

For each child eligible for ANC, the California law provides that there shall be paid the sum of \$60 or so much thereof as is necessary for the adequate care of the child living in a boarding home or institution.

For the purpose of determining financial participation in assistance payments, a boarding home is a private family home which accepts children for board and care, except that this does not apply to the boarding of a child who is related by blood or through marriage, regardless of the degree of relationship.

The state shall pay $\frac{2}{3}$ and the county shall pay $\frac{1}{3}$ as needed up to this amount, less the amount for federal participation, if any, for the care of a child who has county residence. For a child who does not have county residence, the state shall pay as needed up to the full amount shown in Table I, less the amount for federal participation, if any.

(Section Continued on Next Page)

C-506 DETERMINATION OF NEED FOR CHILDREN LIVING IN BOARDING HOMES OR PRIVATE INSTITUTIONS

C-506

A. REQUIREMENTS

The goods and services essential to a minimum basic standard of adequate care for children living in boarding homes or private institutions are the same as those for a child living with his own family or with a relative. (See Sec. C-506, Determination of Need for Children in Family Groups or With Relatives.)

For a child receiving foster care, the boarding home or institution shall meet the requirements for a licensed home or institution.

A boarding home is defined as a private family home which accepts children for board and care, except that this does not apply to the boarding of a child who is related by blood or through marriage regardless of the degree of relationship.

A private institution is defined as a facility, other than a private family home, which accepts children for board and care, and which is not financed, managed, or controlled by a unit of federal, state, or local government.

B. ALLOWANCES TO MEET NEEDS

The allowance for essentials is the rate which the county agrees to pay the boarding home or institution to cover certain goods and services, plus other essential items met from county funds or other sources, on a basis determined by the county.

The county shall record in the narrative which of the essential goods and services are covered by the rate and show how those essentials not included in the rate are provided.

C. RELATION OF INCOME TO NEED

In order to establish the amount of assistance needed for the child in a boarding home or private institution, it is necessary to relate the total net income available to his total need. The child is in need of assistance to the extent that his net income is insufficient to meet the cost of his essentials, including care and supervision. The computation of net income shall be clearly set forth in the record.

(W&IC 1560)

FILED
In the office of the Secretary of State
of the State of California
SEP 30 1952 450 P
FRANK M. JORDAN, Secretary of State
By _____
Assistant Secretary of State

C-512 (Continued)

C-512

Table III - Maximum Reimbursement Amounts for Children Eligible for Federal Participation Living with a Non-Needy Relative

Number of Children	Maximum Participation Base	State Share	County Share	Federal Share
1	\$111	\$ 61	\$30.50	\$ 19.50
2	162	85	42.50	34.50
3	207	105	52.50	49.50
4	246	121	60.50	64.50
5	279	133	66.50	79.50
6	306	141	70.50	94.50
7	327	145	72.50	109.50
8	342	145	72.50	124.50
9	351	141	70.50	139.50
10	357	135	67.50	154.50
11	363	129	64.50	169.50
12	369	123	61.50	184.50
13	375	117	58.50	199.50
14	381	111	55.50	214.50
15 or more	387	105	52.50	229.50*

*See Sec. F-560 of the Manual of Fiscal Policies and Procedures for federal sharing for more than 15 children.

Table IV - Maximum Reimbursement Amounts for Children Ineligible for Federal Participation Living with Relatives

Number of Children	Maximum Participation Base	State Share	County Share
1	\$111	\$ 74	\$ 37
2	162	108	54
3	207	138	69
4	246	164	82
5	279	186	93
6	306	204	102
7	327	218	109
8	342	228	114
9	351	234	117
10	357	238	119
11	363	242	121
12	369	246	123
13	375	250	125
14	381	254	127
15 or more	387	258	129

(Section Continued on Next Page)

C-512 (Continued)

C-512

Federal participation in the Maximum Participation Base (Table I) is provided for cases in which federal requirements are met, not to exceed \$19.50 for one child, \$15 for each additional child, and \$19.50 for the eligible needy relative.

Table II - Maximum Reimbursement Amounts for Children Eligible for Federal Participation Living with a Needy Relative Eligible for Federal Participation

Number of Children	Maximum Participation Base	State Share	County Share	Federal Share
1	\$111	\$ 48	\$ 24	\$ 39
2	162	72	36	54
3	207	92	46	69
4	246	108	54	84
5	279	120	60	99
6	306	128	64	114
7	327	132	66	129
8	342	132	66	144
9	351	128	64	159
10	357	122	61	174
11	363	116	58	189
12	369	110	55	204
13	375	104	52	219
14	381	98	49	234
15 or more	387	92	46	249*

*See Sec. F-560 of the Manual of Fiscal Policies and Procedures for federal sharing for more than 15 children.

(Section Continued on Next Page)

FIND OF EMERGENCY

Revised Section C-512 of the Aid to Needy Children Manual of Policies and Procedures is an emergency regulation. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional federal assistance available to this state for the Aid to Needy Aged, Aid to the Needy Blind and Aid to Dependent Children for a two-year period commencing October 1, 1952.

Section 1511 of the Welfare and Institutions Code provides, "If, when, and during such times as the United States Government increases or decreases its contributions in assistance of the needy children in this State above or below the amount being paid on January 1, 1951, the amounts specified in the above table shall be increased or decreased by an amount equal to such increase or decrease by the United States Government."

In order that the change in grants of approximately 20% of 54,000 families receiving Aid to Needy Children could be made and the increased federal participation in all of the family cases could be claimed effective October 1, emergency regulations were adopted by the Social Welfare Board and issued in Department Bulletins 474 and 475, effective October 1, 1952.

Existing Manual Section C-512 also contains rules and regulations of the department. They are now in conflict with the regulations set forth in Department Bulletins 474 and 475. It is therefore necessary that the revision to this section become operative October 1, 1952, thus removing any conflict with the regulations in Department Bulletins 474 and 475.

These regulations shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 HSO P

FRANK M. JORDAN, Secretary of State

By _____

Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

B. Schouland
(Signature)

Director
(Title)

9/30/52
(Date)

AREA OFFICES

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Earl Warren
Governor

STATE HEADQUARTERS

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616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

September 30, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 477 (OAS, AB)

These regulations were adopted by the State Social Welfare Board on September 26, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, and 114(b) and are being filed in accordance with Sections 11380, 11421(b), and 11422(c).

These regulations are effective October 1, 1952. Three copies of the "Finding of Emergency" are attached.

Very sincerely yours,

C. I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 H50

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

September 26, 1952

DEPARTMENT BULLETIN NO. 477 (CAS, AB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Revision of Manual Sections due
to Changes in Maximum Grant

In the following manual sections containing reference to the amount of the maximum grant in Old Age Security, Aid to Needy Blind, and Aid to Partially Self-supporting Blind Residents, the amount of the maximum grant is hereby changed from \$75 to \$80 in Old Age Security and from \$85 to \$90 in Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents, and any derived computations in examples are hereby changed so as to be consistent with new maximum grants. These changes shall be effective October 1, 1952.

Manual of Policies and Procedures - Old Age Security

Sec. A-110	A-1205	A-1320
A-292	A-1208	A-1322
A-720	A-1306	A-1620
A-1118	A-1310	
A-1132	A-1312	
A-1136	A-1318	

Manual of Policies and Procedures - Aid to the Blind

Sec. B-448	B-633
B-540	B-642
B-548	B-645
B-556	B-648
B-621	B-663

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 6

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

The State Department of Social Welfare will reissue these manual sections as hereby amended as soon as administratively possible.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

FINDING OF EMERGENCY

Department Bulletin No. 477 re Revision of Manual Sections due to changes in maximum grant is an emergency regulation. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional Federal assistance available to this State for Old Age Assistance and Aid to the Blind for a two year period commencing October 1, 1952.

The Legislature of the State of California, meeting in the second extraordinary session in August 1952, adopted legislation as an emergency measure and provided that the legislation take effect immediately so that the additional Federal money could be made available to recipients of aid in this State as soon as it becomes available to this State.

In order that the change in grants of approximately 273,000 recipients of Old Age Security and 11,500 recipients of Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents could be made effective October 1, emergency regulations were adopted by the Social Welfare Board and issued in Department Bulletins No. 472, 473, and 475, effective October 1, 1952.

The Manual Sections listed in Bulletin No. 477 contain rules and regulations of the department which are now in conflict with the regulations set forth in Department Bulletins No. 472, 473, and 475. It is therefore necessary that this bulletin and revisions specified therein become operative October 1, 1952, thus removing any conflict with the regulations in Department Bulletins No. 472, 473, and 475.

These regulations shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

September 30, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Aid to Needy Blind Manual Letter No. 114.

These regulations were adopted by the State Social Welfare Board on September 26, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.6, and 114(b) and are being filed in accordance with Sections 11380, 11421(b), and 11422(c).

These regulations are effective October 1, 1952. Three copies of the "Findings of Emergency" for Sections B-457, B-606, B-609, B-754, and B-758 are attached. The "Finding of Emergency" for Department Bulletin No. 477 covers Section B-448.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By *Charles I. Schottland*
Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

C. J. Schouland
(Signature)

Director
(Title)

9/30/52
(Date)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
October 1, 1952

AID TO THE BLIND MANUAL LETTER NO. 14

The attached revisions numbered 120 through 132 are to be entered in your copy of the Manual of Policies and Procedures - Aid to the Blind and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the State Social Welfare Board on September 26, 1952, to be effective October 1, 1952.

Sec. B-457 has been revised to exclude life and burial insurance which has no cash surrender value from consideration in determining eligibility with respect to personal property.

Sec. B-606, incorporates the revised maximum grants. Revision to other pertinent sections to incorporate the change in the amount of the maximum grant, and to make derived computations in examples consistent with the new maxima, will be forwarded in the near future.

Sec. B-609 incorporates the revised maximum grant and the revised amounts for clothing and incidentals included in the \$90 maximum grant in Aid to Needy Blind.

Sec. B-754 and B-758 have been revised to give the new federal sharing formula which increases the maximum amount of federal participation in an individual Aid to Needy Blind grant from \$30 to \$35.

In Aid to the Blind Manual Letter No. 12, Paragraph 3, Line 7, change the word "employed" to "ineligible."

FILED
In the Office of the Secretary of State

SEP 30 1952

FRANK M. JORDAN, Secretary of State
B. [Signature]
Assistant Secretary of State

B-457 TYPES OF PERSONAL PROPERTY

B-457

In ANB, the current market value of personal property shall be used in determining eligibility.

In APSB, the county assessed value of personal property is considered, except for cash, securities, and cash surrender value of insurance. If personal property is declared but is not listed on the local assessment rolls, it shall be referred to the county assessor to determine whether or not it is assessable, and if assessable, its assessed value. If the property is not assessable, the current market value shall be determined, and the ratio which the assessed valuation in the county bears to the market value shall be used.

It may be necessary to secure verification from appropriate sources to determine the value of certain items of property.

The following includes some of the more common types of personal property:

1. Cash and Bank Accounts--Cash on hand, in a bank account, or safe deposit box, in postal savings, on deposit with building and loan associations or otherwise held where it is payable on demand; the market value of an individual's interest in defunct banks, building and loan associations, etc.
2. Life Insurance--The cash surrender value of a policy or policies of insurance on the life of the applicant or recipient and the spouse. In the case of a married couple, each is considered to have a one-half interest in the cash surrender value of policies carried by either, except when the facts establish that the cash surrender value represents the separate property of the insured. (For exception in APSB, see Sec. B-442; also B-460, last paragraph.)

Cash received in a lump sum by the insured from the surrender or maturing of insurance policies, or cash received as beneficiary of a policy or policies carried by the deceased spouse. (See Item 9, this section, regarding funeral expenses.)

(Section Continued on Next Page)

B-448 (Continued)

B-448

The fact that aid can be granted to either one of the couple but not to both shall be discussed with them. The decision as to which one shall receive aid rests with the couple, but if it is to their advantage to grant to one rather than to the other, it shall be explained to them.

Example 1: Both of a married couple living together apply. Their only personal property is community property which totals \$2300 or \$1150 each. The couple receives net rent of \$20 a month or \$10 each. The wife has medical needs of \$10 a month. The couple is, therefore, in agreement that it is to their advantage to grant aid to the wife who is eligible to the maximum grant whereas the husband would receive only \$80. Her application is granted; his is denied.

Example 2: Man is receiving aid. His separate personal property totals \$1100. The wife applies and it is determined that she has \$1000 separate personal property. There is no community property. There is no advantage to them in granting to one or to the other. His aid continues, and the wife's application is denied.

(W&IC 3047.2, 3075)

B-451 PERSONAL PROPERTY OF MINOR CHILDREN

B-451

Personal property owned by minor children of an applicant or recipient shall not be considered in determining eligibility of the applicant or recipient. Insurance policies held by a minor child are considered to be the property of the child. The cash surrender value of such policies does not affect the parent's eligibility. Emancipation of the child has no bearing on the ownership of such insurance. (W&IC 3075, 3460)

B-454 PERSONAL EFFECTS AS PERSONAL PROPERTY

B-454

In ANB, personal effects, such as clothing, furniture, household equipment, foodstuffs, fuel and personal jewelry, are not considered in determining eligibility.

In APSB, the assessed value of such property is considered.

(W&IC 3047.21)

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In the office of the Secretary of State
State of California

SEP 30 1952 450 P

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

B-457 (Continued)

B-457

Should it be necessary to determine the value of a motor vehicle the license fee for which is in excess of \$24, add to \$1205 that value in the foregoing table which is opposite the amount by which the vehicle license fee exceeds \$24.

The foregoing table cannot be used to determine the value of new automobiles purchased within the current year or the value of second-hand cars bought by recipients during the current year but previously registered in another state. Should it become necessary to determine the market value under either circumstance, contact the local office of the State Department of Motor Vehicles.

6. Stocks and Bonds---In ANB, the current market value of all stocks and bonds shall be used in determining eligibility.

U.S. savings bonds or other bonds or obligations of the U.S. registered in the name of one person payable on death to a named survivor, represent personal property of the registered owner during his lifetime. Upon the death of the registered owner, or co-owner, they become the property of the named survivor or surviving co-owner, unless federal laws and regulations governing the issuance thereof provide otherwise.

In APSB, if stocks and bonds are assessed, this value shall be used. If stocks and bonds are not assessed, the current market value shall be determined.

An estimate of the value of stocks and bonds may be secured from local bankers, brokers, or others qualified to make such estimates.

A person named as co-owner and having possession of a U.S. savings bond shall be presumed to be the owner thereof, unless such ownership is refuted. If the contention is made that all of the funds used to purchase the bond did not belong to the person, and that the bond was not a gift, that interest which is determined as belonging to the person shall be considered in determining eligibility. The person whose name appears on the bond as co-owner and who does not have possession of such bond shall be presumed not to own any part of the bond, unless such lack of ownership is refuted.

The current market value of United States Savings Bonds (Series A to E, inclusive) increases according to the table of values on the back of the bonds. Redemption values increase on the anniversary dates which fall at six month intervals following the first of the month in which the bond was originally issued. Redemption values for several denominations of Series E bonds are listed in the following table:

(Section Continued on Next Page)

B-457 (Continued)

B-457

3. Burial Trust or Similar Funds--The amount of funds placed in a burial trust or any similar fund earmarked for burial purpose. (For exception in APSB, see Sec. B-442. See Sec. B-415, Value of Unassessed Real Property.)
4. Interment Plot--Space intended to be used for interment purposes of the individual, whether a plot in a cemetery, a crypt, vault, etc. Such interment plot shall be considered to have a value of \$50 irrespective of the fact that the purchase price may have exceeded this amount. (For exception in APSB, see Sec. B-442.)
5. Motor Vehicles--The value of automobiles, trucks, motorcycles, etc., owned by applicants or recipients. The value as determined from the license fee recorded on the State Motor Vehicle Department registration card shall be used.

The registration card issued by the Motor Vehicle Department must be carried in every motor vehicle which is taxed by that department. On the registration card (white slip) for passenger cars is recorded the registration fee (\$6.00), and the vehicle license fee which varies in accordance with the value. The amount of the vehicle license fee appears in the space marked "V.L.F. Fee" on the second line above the space provided for the signature of the legal owner.

The registration card for trucks shows the registration fee, the truck weight fee, and the vehicle license fee. Use only that amount which is recorded in the space marked "V.L.F. Fee."

A schedule of the vehicle license fees and the values which they represent follows:

<u>V.L.F.</u>	<u>VALUE OF VEHICLE</u>	<u>V.L.F.</u>	<u>VALUE OF VEHICLE</u>
\$ 1.00	\$ 37.00	\$13.00	\$ 650.00
2.00	105.00	14.00	695.00
3.00	150.00	15.00	755.00
4.00	200.00	16.00	805.00
5.00	250.00	17.00	850.00
6.00	295.00	18.00	905.00
7.00	355.00	19.00	950.00
8.00	405.00	20.00	1000.00
9.00	450.00	21.00	1050.00
10.00	505.00	22.00	1095.00
11.00	550.00	23.00	1155.00
12.00	600.00	24.00	1205.00

(Section Continued on Next Page)

B-457 (Continued)

B-457

8. Inheritance and Gifts--If the recipient receives personal property through the death of the spouse, or is the beneficiary of insurance of a spouse, such property or funds may be considered as being encumbered or charged with the funeral expenses of the deceased. Only the net value, computed after deduction of funeral expenses, shall be considered in determining eligibility. (CC654; AGO NS 4769)

The assessed value of real property or the market value of personal property acquired as a gift or through inheritance shall be considered. (In APSB, the county assessed value is considered, except for cash, securities, and cash surrender value of insurance.) A gift is the separate property of the person who received it. (See Secs. B-536, B-542, B-544 on Gifts.)

9. Lump Sums Received from the Following Sources:

- a. OASI lump sum death payments received as spouse of an insured worker.
- b. Refunds from income tax payments and from excess premium payments (special dividend) on National Service Life Insurance.
- c. Nonrecurrent lump sum payments received by the recipient and/or his spouse from retirement or pension systems of which he or she was a former member; e.g., State Employees Retirement System, Federal Employees Retirement Fund under the U. S. Civil Service Commission, retirement plans of private corporations, etc. (See Sec. B-572, Income from Certain Government Sources.)

10. Conversion of Property--Real property may be converted to personal property, and vice versa, without causing ineligibility provided the real or personal property received, together with other real or personal property holdings, are not in excess of the maximum permitted.

In ANB, if the individual sells real property (title passing to the buyer) and plans to utilize the proceeds received from such sale to purchase a home for his own occupancy, the proceeds from such sale represent real property until the purchase is made, or the expiration of six months from the time of receipt of the proceeds, whichever is earlier. The county assessed value of property sold shall be used in determining real property value of proceeds from sale of the home.

If a home is purchased within a six month period, and the cost of the home is less than the proceeds received from sale of real property, the balance shall be considered personal property as of the first of the following month. If the recipient must make immediate repairs on the purchased property, allowance for the cost of such repairs shall be made when determining whether the cost of the home is less than the proceeds received from the sale.

(Section Continued on Next Page)

B-457 (Continued)

B-457

SERIES E WAR BONDS

<u>Year after month of issuance</u>	<u>\$25</u>	<u>\$50</u>	<u>\$100</u>
-- 1/2	\$18.75	\$37.50	\$75.00
1/2--1	18.75	37.50	75.00
1 --1 1/2	18.87	37.75	75.50
1 1/2--2	19.00	38.00	76.00
2 --2 1/2	19.12	38.25	76.50
2 1/2--3	19.25	38.50	77.00
3 --3 1/2	19.50	39.00	78.00
3 1/2--4	19.75	39.50	79.00
4 --4 1/2	20.00	40.00	80.00
4 1/2--5	20.25	40.50	81.00
5 --5 1/2	20.50	41.00	82.00
5 1/2--6	20.75	41.50	83.00
6 --6 1/2	21.00	42.00	84.00
6 1/2--7	21.50	43.00	86.00
7 --7 1/2	22.00	44.00	88.00
7 1/2--8	22.50	45.00	90.00
8 --8 1/2	23.00	46.00	92.00
8 1/2--9	23.50	47.00	94.00
9 --9 1/2	24.00	48.00	96.00
9 1/2--10	24.50	49.00	98.00
10	25.00	50.00	100.00

Example: A \$25 Series E Bond purchased June 24, 1942, is worth \$18.75 through May 31, 1943. On June 1, 1943 (the first day of the anniversary month), the value increases to \$18.87, on December 1, 1943, to \$19.00, on June 1, 1944, to \$19.12, etc., according to the values given on the back of the bond.

7. Judgments and Compensation--A lump sum received as the result of compensation laws or in payment of a punitive judgment granted because of damages sustained by either the person or property of the applicant or recipient represents personal property. (If weekly or other periodic payments are received as benefits under the provision of compensation laws, such payments represent income.) A cash settlement accepted in lieu of a judgment is considered personal property.

The value of a judgment which has not been executed shall be considered in determining eligibility under personal property requirements. If the judgment is against a solvent corporation, the value of the judgment shall be considered to be equal to the amount of the judgment. If the judgment is against someone other than a solvent corporation, the county shall determine the ability of the judgment debtor to pay.

If the judgment cannot be executed because the debtor or his property cannot be located, or the judgment creditor has the judgment vacated, the value of the judgment shall not be considered.

If a judgment is the subject of an action brought by the judgment debtor in a higher court to vacate the judgment, and the judgment creditor is prohibited from executing the judgment, that portion of the value of the judgment remaining unsatisfied shall not be considered in determining eligibility while court action is pending. (See Sec. B-532, Definition of Income.)

(Section Continued on Next Page)

B-457 (Continued)

B-457

14. Leases--Leases for a term of years are personal property. Exception: A lease is real property when it is for a period of not less than 10 years and the leased premises are used as a place of residence for the lessee. If houses, cabins, etc., are placed upon leased land with the provision in the lease that they remain the property of the lessee, such holdings represent personal property, if the lease is personal property; real property if the lease is real property. In general, if the period of the lease is not specified, it is presumed to be one year.
15. Conditional Sales Contracts--(See Sec. B-466)
16. Undistributed Estates--An heir's available interest in an undistributed estate. In determining the value of the inheritance, if any, which is available before distribution, consideration should be given to known indebtedness and to an estimate of the administrative costs exclusive of inheritance taxes. This estimate of administrative expense (exclusive of inheritance tax) may be deducted from the appraised value as filed with the probate court in determining the net amount of personal property available prior to distribution.

When two or more heirs have an undivided interest in an undistributed estate which is in fact available prior to distribution, each is considered to have an interest in proportion to the number of known heirs.

17. Trust Funds--An interest in the corpus of a trust only to the extent that the property is in fact available. If ownership of the trust is dependent upon the occurrence of a certain event, such as the individual attaining the age of 21 years, such trust is not considered his property until the stipulated event occurs. (AGO NS 4769)

(W&IC 3047, 3047.2, 3047.5, 3075, 3447, 3447.3, 3460)

B-460 DEFINITIONS OF INSURANCE TERMS

B-460

Net value of date of maturity is determined by adding the amount of paid up additions, if any, to the face value of the policy, and subtracting the amount of any loans made by the company against that policy.

Date of maturity is the date on which the net value of maturity becomes due and payable. Most insurance policies do not mature until the death of the insured. A "20 or 30 pay" life insurance policy normally matures upon the death of the insured and not with the completion of the premium payments or at the end of any specified period of time. The net maturity value of an endowment policy

(Section Continued on Next Page)

B-457 (Continued)

B-457

The plan for the use of the proceeds shall be ascertained when the sale becomes known. The plan as reported by the individual shall be recorded in the case record.

In APSB, proceeds received by a recipient from involuntary conversion of real property shall be considered real property for a period of one year from date of receipt. In order that such funds can be considered as real rather than personal property during the one year period there must be evidence that the sale was involuntary. (If there is any question that a particular action was involuntary, the matter should be referred to the county's legal advisor.) Any of the proceeds remaining at the termination of the one year period shall be considered as personal property in determining eligibility to continued aid.

The value of any increment (interest and/or increase) accruing from the converted property shall be considered in the same manner as other income or property.

11. Notes, Mortgages and Deeds of Trust--The value of notes, mortgages and deeds of trust, i.e., the amount which could be realized if such instruments were offered for quick sale, shall be ascertained. An estimate of their value may be secured from local bankers, realtors, loan companies or others qualified to make such estimates, except when the face value or amount still due, together with all other personal property are within the allowable maximum. Two or more estimates should be secured if the first estimate of the total personal property holdings is slightly below or above the maximum allowed. Additional estimates should also be secured if the first estimate appears to be unrealistic in light of the factors affecting current market value.
12. Business Enterprise--The value of an individual's interest in personal property as represented by the stock on hand, fixtures and equipment, and the "accounts receivable" of a commercial or other business enterprise. Accounts due from customers as shown on the books of a business which are unsecured by notes, drafts, etc., i.e., "accounts receivable," to be of value must be valid and collectible. The value of "accounts receivable" will vary with the age of the accounts, the credit of the debtors and the regularity with which payments have been made. A representative of a collection agency, a retail credit association or other organization familiar with collections may be of assistance in estimating the value of "accounts receivable."
13. Value of Farm Equipment, Live Stock and Fowl--The value of farm machinery and equipment, such as tractors, cultivators, etc., and live stock and fowl. An estimate of their value may be secured from county agricultural agents, the Farm Security Administration, the Federal Land Bank, firms or individuals qualified to estimate the resale value of such holdings.

(Section Continued on Next Page)

B-605 (Continued)

B-605

or other more permanent arrangements, cashing the check, paying bills, and buying groceries and other items. Here again, not the character of the service but the way in which the service is provided will determine whether or not the aid payment is restricted.

(W&IC 3003, 3008, 3075, 3042, 3460, AGO NS 1382, NS 2382, FSS-Admin.)

B-606 DETERMINATION OF THE AMOUNT OF AID

B-606

The maximum amount of aid which a person shall be entitled to receive shall be \$90 a month.

1. ANB: The amount of aid is determined by:

- a. the amount of income other than exempt income, and
- b. the total need of the individual.

The monthly grant (not to exceed \$90) is the exact difference between the individual's total need and the amount of non-exempt income, if any. (See Sec. B-540, Exempt Income in ANB.)

Example: An ANB recipient has a total need of \$115. He has income from earnings in the amount of \$15 a month, and from the value of currently used resources in the amount of \$4 a month. The income from earnings is exempt, and \$4 is deducted from the total need. The grant is \$90 since it cannot exceed that amount.

If, in the same example, the individual had a total need of \$93.50, the grant would be \$89.50.

2. APSB: The monthly grant is \$90 until the full amount of exempt income is allowed. (See Sec. B-542, Exempt Income in APSB; B-642, Adjustment in Amount of Aid.)

After the allowance of exempt income is made, the grant shall be the exact difference between \$90 and the non-exempt income.

(W&IC 3025, 3075, 3082.1, 3084, 3084.3, 3089, 3420, 3460, 3472)

B-607 AID FOR RECIPIENT ONLY

B-607

The total amount of ANB or APSB granted, including exempt income, is intended to help meet the individual needs of the ANB or APSB recipient. Such aid and exempt income shall not be construed as benefiting any other person, including any who are living in the same household with the recipient, and no portion of the aid granted or the exempt income shall be construed as income to any other person.

(W&IC 3003, 3402, 3084.3, 3472)

B-605 (Continued)

B-605

4. Providing services to a recipient's creditors, such as assisting creditors in the collection of the recipient's debts.
5. Payments paid through the medium of a county trust fund or account, and by which the full amount of the warrant is not delivered to the recipient each month.

Services Performed in a Way Consistent with the Money-Payment Principle:

It is the manner in which service is given which determines whether or not the payment is restricted. Various services to recipients can be given in such a way that neither restricted payments nor restrictive practices occur. The following paragraphs describe the ways in which a number of services can be performed in a manner which harmonizes with the money-payment principle:

1. Furnishing information--Informing recipients of community resources provided the recipient, not the agency, decides how and whether resources will be used.
2. Referral and help in using resources--Referring recipients to other agencies and advising recipients how to use community resources are also proper agency functions. These referrals and the advice to recipients shall be given in such a way as not to conflict with the recipient's choice in the use of the payment.
3. Counseling--If advice and counsel about personal problems are given by an agency because the recipient wished it and if the agency worker deals with the problem in the same way as if it had occurred in a self-supporting family, no restrictive payment results. However, controlling the behavior of recipients is not an appropriate function of an assistance agency.

If authoritative action is found essential to protect the welfare of recipients or members of their families, the situation should be referred to the courts, or other appropriate enforcement agencies. The use by the public assistance agency of its power to provide or withhold assistance through threats or penalties associated with counseling results in restricted payments.

4. Personal services in which the agency acts for the recipient--Recipients who are infirm, bedridden, or otherwise incapacitated often request the help of the agency in selecting their mode of living and managing their resources. Such help may include, in a few instances and for a limited period of time pending the appointment of a guardian

(Section Continued on Next Page)

B-612 SPECIAL NEEDS--DEFINITION AND DETERMINATION
ANB ONLY

B-612

Special needs are not common to all recipients, but an individual recipient may have need for one or more of them. The special needs listed below shall be taken into consideration under the circumstances and within the monetary limits indicated.

1. Food--The amount by which the cost of special diet exceeds the cost of basic food (\$32.85) represents special need and is to be computed in accordance with the department's Special Diet Schedule, plus 30%. The "Special Diet Schedule" is prepared by the SDSW and released to the counties as often as price changes require.

If the circumstances require that the recipient eat his meals in restaurants, the cost in excess of basic food shall be allowed up to \$21.40 a month.

2. Housing--If adequate housing is not available at less cost within the community, or if a health condition requires close proximity to a medical or shopping center, or if employment of the recipient or his spouse makes proximity to the place of employment a factor, special need exists as follows:

Rent--If rent, including no utilities, for a recipient living alone or living with someone other than a spouse, exceeds \$15 the amount in excess thereof, up to a maximum of \$25, represents special need. The basic allowance of \$15 plus \$25 results in a \$40 maximum for rent. If the recipient lives with an eligible or ineligible spouse, his share of the rent shall be considered to be no more than one-half of the total rent, up to a maximum of \$65 for the total rent. If his share exceeds \$15, the amount in excess thereof, up to a maximum of \$17.50, represents special need. The basic allowance of \$15 plus \$17.50 results in a \$32.50 maximum for the recipient's share of the rent.

If the rent, including utilities, for a recipient living alone or living with someone other than a spouse, exceeds \$21.80, the amount in excess thereof, up to a maximum of \$25, represents special need. The basic allowance of \$21.80 plus \$25 results in a \$46.80 maximum for rent, including utilities.

If a recipient lives with an eligible or ineligible spouse, his share of the rent, including utilities, shall be considered to be no more than one-half of the total rent, up to a maximum of \$71.80 for the total rent. If his share exceeds \$21.80, the amount in excess thereof, up to a maximum of \$14.10 represents special need. The basic allowance of \$21.80 plus \$14.10 results in a \$35.90 maximum for the recipient's share of the rent.

(Section Continued on Next Page)

B-609 DETERMINING NEEDS--GENERAL
ANB ONLY

B-609

The law recognizes that the total need of the individual may actually be in excess of the maximum statutory grant of \$90 a month. If the circumstances of the individual are such that need in excess of \$90 a month exists, the cost of such need shall be considered in addition to the cost of basic needs to determine the total need.

The ANB basic continuing needs are valued as follows:

Food	\$32.85
Housing	15.00
Utilities	6.80
Clothing	9.85
Household Maintenance and Replacements	5.50
Transportation	4.50
Incidentals	15.50
Total	<u>\$90.00</u>

There are many special needs which are often incident to blindness or unusual circumstances and which may be necessary to effect those physical, social, or economic adjustments required to promote the well-being of the individual blind person.

Needs in excess of the basic continuing needs shall be determined on the basis of the individual's circumstances, and to the extent that is required to cover factual and realistic needs. These needs must be determined with reference to the health, comfort, and well-being of the individual and not a family group.

In those instances where there is non-exempt income, including the value of currently used resources, there shall be recording in the case record concerning discussion with the recipient as to any special needs he may have, the amount required to meet them, and the determination with regard to the establishment of these needs. (See Sec. B-612, Special Needs-Definition and Determination.)

(W&IC 3075, 3084, 3084.1)

B-752 (Continued)

B-752

C. Hospitalization

Federal participation is available for a recipient receiving medical or surgical care in a public medical institution in accordance with Sec. B-521, Recipients in Public Medical Institutions--Federal Reimbursement.

Federal participation is available in payments to patients in private hospitals or private institutions. Exception: Federal participation is not available in payments to patients in private hospitals or private institutions maintained for the purpose of treating persons suffering from tuberculosis or mental disease or if the patient is in another type of private hospital or institution with a diagnosis of tuberculosis or psychosis. Federal participation is therefore not available in payments to recipients in private homes or institutions licensed by the SDMH to care for the mentally ill or in private tuberculosis institutions licensed by the SDPH.

If federal participation is in order on the first day of the month, the Federal Government participates in the payment for the full month although the recipient may be admitted to a tuberculosis or mental hospital during the month.

D. Guardianship

There is no federal participation in payments made to a guardian who is an employee of the SDMH. (See Sec. B-155, Guardianship.)

E. Aid in Kind and Restricted Payments

Neither federal nor state participation is available in aid payments which are restricted, or for aid given in kind. (See Sec. B-605, Money Payments and Restrictive Payments.)

(W&IC 3075, 3087, FSS-Admin.)

B-752 (Continued)

B-752

No change in the authorized award should be made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the authorized award for each month.

Example 4: The authorized award in ANB is \$50. Through error \$60 is paid in January. In February or March \$10 less than the authorized award is paid to adjust for the \$10 overpayment in January. No change in the award is made to correct the overpayment. A letter notifying the SDSW of the error and the month in which the adjustment is to be made will assure full federal participation in the maximum basis of \$100 for the two months.

3. Delayed Payment

If a grant of aid has been properly authorized but either the issuance or release of the warrant has been delayed in such situations as are described in:

- a. Items 4 and 6 of Sec. B-630, for initial warrants.
- b. Items 3 through 8 of Sec. B-630, for other warrants.

The Federal Government participates provided the payment is released within the two months following the month for which delivery was not made.

4. Payment with Respect to an Erroneous Discontinuance

If an erroneous discontinuance is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action is taken and the two preceding months.

5. Appeals to SSWB

If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, in addition to the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.

Federal participation is not available for retroactive payments for any months between the expiration of the 90-day period and the month(s) in which aid is authorized except if aid has been improperly denied and such action is later rescinded, provided such period does not antedate the month in which payment was improperly denied or withheld.

Example 5: An ANB application was signed on July 5. The 90-day period ended October 3. The application was granted on November 8. Aid is paid from October 1. There is no federal participation in the payment made in November for October.

Example 6: Application for ANB is signed on August 5. The 90-day period expires November 3. Determination that applicant is eligible is not made until January 10, when aid is approved to begin November 2, the first of the month during which the 90-day period expires. There is no federal participation in the ANB payments made in January for November and December.

(Section Continued on Next Page)

B-756 FEDERAL PARTICIPATION IN ADMINISTRATIVE COST
ANB ONLY

B-756

There is no state participation in administrative costs

Federal participation in county administrative costs is claimed on the basis of one-half of the actually incurred costs of administration for:

- a. Aid to Needy Blind cases and
- b. Recognized services reasonably related to the ANB program.

Expenditures for Examinations
ANB only

Federal participation may be claimed for cost of required eye or neuro-psychiatric examinations for ANB.

Necessary expenses to the county for transporting an applicant for or recipient of ANB to obtain the required examination are administrative expenses subject to federal reimbursement provided:

1. The applicant or recipient is not financially able to meet such costs, and
2. There is no accessible ophthalmologist or optometrist on the panel or no neuropsychiatrist in the county and the person must be transported to another county or state, or
3. Transportation to another county or state is necessary for examination by an ophthalmologist or optometrist who had not previously examined the person, or
4. The distance to the nearest accessible ophthalmologist or optometrist on the panel or neuropsychiatrist in the county is great and transportation to his office is necessary, or
5. The blind person is bedfast and the cost of transportation of the ophthalmologist, optometrist, or neuropsychiatrist to the home of the blind person is incurred by the county, or
6. The blind person requires an attendant to accompany him to the examiner's office.

(W&IC 3075, 3083, 3087, FSS-Admin.)

B-754 FEDERAL PARTICIPATION BASIS
ANB ONLY

B-754

The maximum basis for federal participation is \$55. The federal share is: 4/5 of \$25, plus 1/2 of the difference between the amount paid (not counting excess over \$55) and \$25. If the grant is less than \$25, 1/2 of the difference between the grant and \$25 is deducted from 4/5 of \$25. The maximum federal share is \$35.

The short formula for computing the federal share is: 1/2 the amount paid (not counting excess over \$55) plus \$7.50.

Example A: ANB grant \$80, federal basis \$55

Regular formula

$$\begin{aligned} 4/5 \times \$25 &= \$20.00 \\ 1/2 \times (\$55 - \$25) &= \$30/2 = \$15.00 \\ \text{Federal Share} &= \$20 + \$15 = \$35.00 \end{aligned}$$

Short formula

$$\text{Federal Share} = (\frac{1}{2} \times \$55) + \$7.50 = \$27.50 + \$7.50 = \$35.00$$

Example B: Grant \$17, federal basis \$17

Regular formula

$$\begin{aligned} 4/5 \times \$25 &= \$20.00 \\ 1/2 \times (\$17 - \$25) &= -\$8/2 = -\$4.00 \\ \text{Federal Share} &= \$20.00 - \$4.00 = \$16.00 \end{aligned}$$

Short formula

$$\text{Federal Share} = (\frac{1}{2} \times \$17) + \$7.50 = \$8.50 + \$7.50 = \$16.00$$

Example C: Grant \$4, federal basis \$4

Regular formula

$$\begin{aligned} 4/5 \times \$25 &= \$20.00 \\ 1/2 \times (\$4 - \$25) &= -\$21/2 = -\$10.50 \\ \text{Federal Share} &= \$20 - \$10.50 = \$9.50 \end{aligned}$$

Short formula

$$\text{Federal Share} = (\frac{1}{2} \times \$4) + \$7.50 = \$2 + \$7.50 = \$9.50$$

(W&IC 3025, 3087, FSS-Admin.)

FINANCIAL PARTICIPATION

Aid to the Blind

B-758 (Continued)

B-758

APSB

PERIOD COVERED	MAXIMUM GRANT	RATIO OF PARTICIPATION	
		STATE SHARE	COUNTY SHARE
10/1/52 thru 9/30/54	\$90	5/6 of Grant	1/6 of Grant
2/1/49 thru 9/30/52	85	5/6 of Grant	1/6 of Grant
10/1/47 thru 1/31/49	75	5/6 of Grant	1/6 of Grant
3/1/47 thru 9/30/47	65	1/2 of Grant	1/2 of Grant
9/15/45 thru 2/28/47	60	1/2 of Grant	1/2 of Grant
7/1/41 thru 9/14/45	50	1/2 of Grant	1/2 of Grant

(W&IC 3025, 3042, 3084, 3087, 3087.1, 3420, 3432, 3472, 3480, FSS-Admin.)

B-758 FINANCIAL PARTICIPATION CHARTS

B-758

ANB

PERIOD COVERED	MAXIMUM GRANT	MAXIMUM FEDERAL BASIS	RATIO OF PARTICIPATION		
			FEDERAL SHARE	STATE SHARE	COUNTY SHARE
10/1/52 thru 9/30/54	\$90	\$55	1/2 up to \$55 plus \$7.50	3/4 of Remainder	1/4 of Remainder
7/1/50 thru 9/30/52	85	50	1/2 up to \$50 plus \$5	3/4 of Remainder	1/4 of Remainder
1/1/49 thru 6/30/50	85	50	1/2 up to \$50 plus \$5	Remainder	None
10/1/48 thru 12/31/48	80	50	1/2 up to \$50 plus \$5	3/4 of Remainder	1/4 of Remainder
10/1/47 thru 9/30/48	75	45	1/2 up to \$45 plus \$2.50	3/4 of Remainder	1/4 of Remainder
3/1/47 thru 9/30/47	65	45	1/2 up to \$45 plus \$2.50	1/2 of Remainder	1/2 of Remainder
10/1/46 thru 2/28/47	60	45	1/2 up to \$45 plus \$2.50	1/2 of Remainder	1/2 of Remainder
9/15/45 thru 9/30/46	60	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
1/1/40 thru 9/14/45	50	40	1/2 up to \$40	1/2 of Remainder	1/2 of Remainder
7/1/36 thru 12/31/39	50	30	1/2 up to \$30	1/2 of Remainder	1/2 of Remainder
8/14/29 thru 6/30/36	50	0	None	1/2 of Grant	1/2 of Grant

Example: The following shows the federal, state, and county contributions for the indicated grants, in accordance with the above chart.

GRANT	FEDERAL SHARE	STATE SHARE	COUNTY SHARE
\$90.00	\$35.00	\$41.25	\$13.75
75.00	35.00	30.00	10.00
17.00	16.00	.75	.25

(Section Continued on Next Page)

FINDING OF EMERGENCY

Revised Section B-457 of the Aid to the Blind Manual of Policies and Procedures is an emergency regulation. Its adoption is necessary for the immediate preservation of the general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts on which these findings are based are as follows:

The personal property reserve of an applicant for, or recipient of Aid to Needy Blind may not exceed \$1200 after encumbrances of record have been deducted; in the case of a couple the value of their combined personal property may not exceed \$2000 after encumbrances of record have been deducted.

The existing departmental rule requires that the face value of paid up burial insurance, not to exceed \$500, be included in the \$1200, and \$2000 maxima. Such burial insurance policies generally have no cash surrender value during the life of the insured.

Attorney General's Opinion 52-68 states that burial insurance is a form of life insurance and since W & I Code Section 3047.2 provides that no life insurance shall be valued at more than its present cash surrender value the existing rule is held to be contrary to the provisions of the law.

Section B-457, as revised, brings the regulation into conformity with the legal requirements. Its adoption as an emergency regulation is necessary in order that the rule will conform to the law and so that persons whose resources are such that they meet the requirements of the law will not be denied aid on the basis of a rule which has been held to be contrary to the expression of the Legislature.

These regulations shall become operative October 1, 1952.

These regulations shall be effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 450

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

FINDING OF EMERGENCY

Revised Sections B-606, B-609, B-754, and B-758 of the Aid to the Blind Manual of Policies and Procedures are emergency regulations. Adoption is necessary for the immediate preservation of the public peace, health, safety and general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary, and contrary to the public interest.

The facts upon which these findings are based are as follows:

The Congress of the United States, by the Social Security Act amendments of 1952, made additional federal assistance available to this state for the Aid to Needy Blind, Aid to Needy Aged, and Aid to Dependent Children for a two year period commencing October 1, 1952.

The Legislature of the State of California, meeting in the second extraordinary session in August 1952, adopted legislation as an emergency measure and provided that the legislation take effect immediately so that the additional federal money could be made available to recipients of aid in this state as soon as it becomes available to this state. Legislation was also adopted to take effect immediately so that additional state money could be made available to increase the grants of Aid to Partially Self-supporting Blind Residents at the same time and equivalent to the increases being granted recipients of Aid to Needy Blind.

In order that the change in grants of approximately 12,000 recipients of Aid to the Blind could be made effective October 1, emergency regulations were adopted by the Social Welfare Board and issued in Department Bulletins 473 and 475, effective October 1, 1952.

Existing Manual Sections B-606, B-609, B-754, and B-758 also contain rules and regulations of the department. They are now in conflict with the regulations set forth in Department Bulletins 473 and 475. It is therefore necessary that the revisions to these sections become operative October 1, 1952, thus removing any conflict with the regulations in Department Bulletins 473 and 475.

These regulations shall become effective immediately upon filing with the Secretary of State.

FILED

In the office of the Secretary of State
of the State of California

SEP 30 1952 4508

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

4 Certified as a Regulation (or
as Regulations) of the

State Dept of Social Welfare
(Name of State Agency)

C. J. Scotland
(Signature)

Director
(Title)

9/5/52
(Date)

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

DIRECTOR

September 5, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 473 (ANB-APSB)
DEPARTMENT BULLETIN NO. 473 - Supplement(ANB,APSB)
DEPARTMENT BULLETIN NO. 475 (Fiscal)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 1510, 1560, 2020.001, 2025.1, 2160, 3084.1, 3075, 3460, and 3472.1 on August 13, 1952, and are being filed in accordance with Sections 11380 and 11422(b) of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest. Three copies of each "Finding of Emergency" adopted by the State Social Welfare Board on August 13, 1952 are attached.

FILED

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15 PM

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State
Attachments

Very sincerely yours,

[Signature]

Charles I. Schottland
Director

Payments of aid shall be made in the manner provided in Sections 3087.1 to 3087.3, inclusive, of this code."

"3084.1. If, when, and during such times as the United States Government increases its contributions in assistance of the needy blind in this State, the amount of the grant of aid provided in this chapter shall be increased by an amount equal to such increase by the United States Government, but in no event shall the total aid granted to any needy blind person under this chapter be more than ninety-five dollars (\$95) per month."

"3420. There is hereby appropriated out of any money in the State Treasury not otherwise appropriated to every county in the State for maintaining, supporting, or caring for, as provided in this chapter, blind persons who come within the provisions of this chapter and who have county residence as provided in this chapter, aid not in excess of a sum equal to five-sixths of the grant made pursuant to this chapter to every such blind person, each month for each such blind person so maintained, supported and cared for, by such county. There is hereby further appropriated to every county within this State for the purpose of maintaining, supporting, or caring for blind persons who come within the provisions of this chapter and who have no county residence as provided in this chapter, aid not in excess of a sum equal to the full amount of the grant made pursuant to this chapter to each such blind person who has no such county residence, each month for each such blind person."

"3472.1. If, when, and during such times as the amount of the grant of aid to the needy blind provided by Chapter 1 of this part is increased pursuant to Section 3084.1, the amount of the grant of aid to partially self-supporting blind residents provided by this chapter shall be increased by an amount equal to such increase in the grant of aid to needy blind persons, but in no event shall the total aid granted under this chapter to any recipient exceed ninety-five dollars (\$95) per month."

Section 3084.1, Welfare and Institutions Code, results in an increase in the statutory maximum Aid to Needy Blind payment from \$85 to \$90 a month thus making available to recipients the \$5 increase in Federal participation authorized by Public Law No. 590.

The addition of Section 3472.1 to the Welfare and Institutions Code results in an increase in the statutory maximum Aid to Partially Self-supporting Blind Residents grant from \$85 to \$90 a month.

Appropriate adjustments shall be made in the grants for all Aid to Needy Blind and Aid to Partially Self-supporting Blind recipients to take into consideration the increased Old Age and Survivors Insurance benefit payments and the increase in the statutory maximum grant from \$85 to \$90, effective October 1, 1952.

In general the amount of the grant to be effective October 1, 1952, will be computed on the basis of need and income information currently included in the individual case record. Except for "New Start" cases (See Sec. C below) and cases involving a minor child or children (See Circular Letter 574 Supplement, Item III), the adjusted amount of the Old Age and Survivors Insurance income to be received in October can be determined from the amount presently received by use of the Conversion Tables released with Circular Letters 574 and 574 Supplement. It should not be necessary to contact the Old Age and Survivors Insurance field office to secure this information.

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 14, 1952

DEPARTMENT BULLETIN NO. 473 (ANB - APSB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

FILED
In the office of the Secretary of State
of the State of California
SEP 5 1952 4:15 PM
FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

Subject: Amendments to Social Security
Act and to the W&I Code,
Operative 10/1/52

The Federal Social Security Act has been amended by the adoption of Public Law No. 590 (H.R. 7800). Public Law No. 590 contains two important provisions which affect Aid to the Blind:

1. OASI payments to individuals are increased effective September 1, 1952. The first payments in the increased amounts will be received shortly after October 1, 1952.
2. Federal matching base in Aid to Needy Blind is increased from \$50 to \$55 effective October 1, 1952. This results in the maximum amount of federal participation being increased from \$30 to \$35 in a grant of \$55 or more. (See Department Bulletin No. 475, Changes in Fiscal Policies and Procedures effective October 1, 1952.)

Sections 3025 and 3084.1 of the Welfare and Institutions Code have been amended by the Second Extraordinary Session. Section 3420 has been amended and Section 3472.1 has been added. These amendments which become operative October 1, 1952 provide:

"3025. State Appropriations to Counties. There is hereby appropriated out of any money in the State Treasury not otherwise appropriated to every county in the State for maintaining, supporting or caring for, as provided in this chapter, needy blind persons who come within the provisions of this chapter and who have county residence as provided in this chapter, aid not in excess of a sum equal to three-fourths of the grant made pursuant to this chapter to every such needy blind person, after deducting therefrom the amount of any sum received from the United States Government for aid to the blind in respect to such blind person, each month for each such needy blind person maintained, supported and cared for by such county. There is hereby further appropriated to every county within this State for the purpose of maintaining, supporting, or caring for needy blind persons who come within the provisions of this chapter and who have no county residence as provided in this chapter, aid not in excess of a sum equal to the full amount of the grant made pursuant to this chapter to each such needy blind person who has no such county residence, after deducting therefrom the amount of any sum received from the United States Government for aid to the blind in respect to such needy blind person, each month for each such needy blind person.

2. Circumstances Under Which Authorization by Notice of Change (or Similar Document) is Required.

The Notice of Change (Form Bl 232) or an individual document devised by the county giving information similar to that required by the Notice of Change, must be prepared and filed in the case record for each case in which

- (a) Old Age and Survivors Insurance is received either directly or by allocation of a portion of a spouse's primary benefit
- or
- (b) There is change in the recipient's need and/or income other than that occasioned by the increase in the statutory maximum grant or the increase in Old Age and Survivors Insurance payment.

B. Standard of Assistance (Aid to Needy Blind only)

1. Basic Continuing Needs

The amendment to Section 3084.1 of the Welfare and Institutions Code operative 10/1/52, results in an increase in the statutory maximum Aid to Needy Blind grant from \$85 to \$90. The amounts within the \$90 grant for basic needs are as follows:

Food	\$32.85
Housing	15.00
Utilities	6.80
*Clothing	9.85
Household Maintenance and replacements	5.50
Transportation	4.50
*Incidentals	15.50
	<u>\$90.00</u>

* These supersede the money amounts given for incidentals and clothing in Manual Section B-609.

2. Special Needs.

No changes are being made in special need allowances at this time.

3. Nursing Home, Sanatorium, or Rest Home Care.

The grants for Aid to Needy Blind recipients who are residing in a nursing home, sanatorium, or rest home shall continue to be computed in accord with the provisions of Manual Section B-615, Item D. The maximum allowance for nursing home care shall not exceed the actual cost of the care or the ceiling allowance provided in the above section, whichever is less. The additional allowance for clothing and incidental needs remains at \$20. Any recipient currently residing in such a nursing home, sanatorium, or rest home whose present income, together with his Aid to Needy Blind grant, is equal to his total need will receive no increase in grant effective October 1, 1952.

A recipient who is residing in such nursing home and who presently has a deficiency between his need and income, including his Aid to Needy Blind grant, will receive an increase in his Aid to Needy Blind grant effective October 1, 1952.

Effective October 1, 1952, all recipients of Aid to Needy Blind (federal or non-federal cases) should receive an automatic \$5 increase in the Aid to Needy Blind grant except for the following:

1. Those who are receiving Old Age and Survivors Insurance income either directly or as an allocation.
2. Those who have changes in need or income other than changes occasioned by the increase in the statutory maximum grant from \$85 to \$90 or the increase in Old Age and Survivors Insurance payments.
3. Those who are residing in a nursing home, sanatorium, or rest home and whose need is determined in accord with Manual Section B-615, Item D. (See Section B-3 below)

Effective October 1, 1952, all recipients of Aid to Partially Self-supporting Blind should receive an automatic \$5 increase in the Aid to Partially Self-supporting Blind Residents grant except those in which an adjustment in the amount of aid is due as provided in Manual Section B-642.

A. Authorization Process

In order that one warrant may be issued in October to cover the full amount payable for that month, and so that the warrant may be delivered without delay, action should be taken by the Board of Supervisors, or its delegated agent, in August or September on all changes to be effective October 1, 1952.

1. Circumstances Under Which Authorization by List is Permitted.

It is not necessary to prepare individual Notice of Change documents (Form BI 232) for recipients who receive an automatic \$5 increase. Such recipients are those who

- (a) Have no income (other than exempt income) or
- (b) Their only income is from sources other than Old Age and Survivors Insurance, and there is no known change in their need or income effective 10/1/52 except the change occasioned by the increase in the statutory maximum grant from \$85 to \$90.

The automatic \$5 increase may be authorized in list form. If lists are used, they shall show the state number, the name, the old rate, the new rate, and carry an appropriate certification and authorization signed by the County Clerk (or deputy) or by the delegated agent of the Board of Supervisors. In counties using mechanical equipment, this information may be contained on two lists. The cases shall be listed in numerical order according to state number. A suggested list form is attached to this bulletin.

If lists are used the following information shall be recorded in the individual care record.

"Aid increased to \$-----, effective October 1, 1952, per Welfare and Institutions Code, Section 3084.1 (or Section 3472.1)."

At the option of the county, the date of authorization need not be shown in the case record if the county is prepared to provide the authorization date upon request.

Use of a rubber stamp is suggested in order to record the above information in the individual case record.

C. "New Start" Old Age and Survivors Insurance Cases

Circular Letter No. 574 called attention to the fact that a few recipients who are primary Old Age and Survivors Insurance beneficiaries will receive Old Age and Survivors Insurance in amounts different from that determined by Conversion Table No. 1. More recent information received from the Federal Security Agency indicates that this group includes:

1. Primary beneficiaries who qualified under the "New Start" provisions which became effective in *January 1951 and who received Old Age and Survivors Insurance benefits for the first time for April 1952 or later
and
2. Secondary or other beneficiaries who receive Old Age and Survivors Insurance benefits based upon the record of a wage earner who qualified under the "New Start" provisions and received Old Age and Survivors Insurance benefits for the first time for April 1952 or later.

* Circular letter 574 erroneously referred to these provisions as being effective in September 1950.

The October Old Age and Survivors Insurance income for such recipients may be determined from the Conversion Tables released with Circular Letters No. 574 and 574 Supplement without regard to whether the case might be affected by the "New Start" provisions.

D. Railroad Retirement

Circular Letter No. 571 called attention to the fact that under the provisions of H.R. 7800 a small number of persons now receiving income under the Railroad Retirement Act will receive an increase in the amount of pension. The increased payments will be made available as individual cases are processed and no increases are anticipated until after October.

E. Notification to Recipients

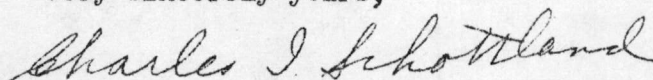
Form BL 239, Notification of Action, need not be sent to recipients who receive an automatic \$5 increase in grant. For all other cases for which grants are changed effective October 1, 1952, the usual notification shall be sent. (Manual Section B-232)

All recipients who are receiving Old Age and Survivors Insurance shall be notified of their continued responsibility to report their income from earnings or income from any other source to the welfare department. The statement suggested in Circular Letter No. 574 may be used or a county devised statement containing the same general information may be used. Such notification shall go to the recipient not later than October 1, 1952.

F. Revised Manual Sections

The appropriate sections of the Aid to the Blind Manual of Policies and Procedures will be revised as soon as administratively possible to bring them into conformity with the provisions of this bulletin.

Very sincerely yours,



Charles I. Schottland
Director

Attachment

AID TO THE BLIND AUTOMATIC INCREASE LIST

EFFECTIVE OCTOBER 1, 1952

The following recipients of Aid to Needy Blind and Aid to Partially Self-supporting Blind are entitled to an increase in aid of five dollars (\$5.00) per month each. These increases are made to conform to the provisions of amended Title X of the Social Security Act and Sections 3084.1 and 3472.1 of the Welfare and Institutions Code, effective October 1, 1952.

This list does not include cases in which there is income from OASI, a change in other income or a change in the recipient's need other than that occasioned by the increase in the statutory maximum payment.

Approved by the County of _____ on _____
(Date)

Authorized Signature

Name	State No.	Old Rate	New Rate
------	-----------	----------	----------

FILED

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15 PM

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

FINDING OF EMERGENCY

The attached Bulletin No. 473 is an emergency regulation. Its adoption is necessary for the immediate preservation of the public peace, health and safety or general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary and contrary to the public interest.

The facts upon which these findings are based are as follows:

During recent months rapidly rising prices and monetary inflation have made the maximum amounts of public assistance payable to recipients thereof increasingly inadequate for their reasonable needs resulting in widespread hardship and suffering among such recipients.

The Congress of the United States, by the Social Security Act Amendments of 1952, has made additional federal assistance available to this state for Aid to the Needy Aged, Aid to the Needy Blind and Aid to Dependent Children, for a two year period commencing October 1, 1952. The Social Security Act Amendments of 1952 also increase the amount of Old Age and Survivors Insurance payments to many of the recipients of aid.

The Legislature of the State of California meeting in the Second Extraordinary Session has adopted legislation as an urgency measure necessary for the immediate preservation of the public peace, health or safety within the meaning of Article IV of the Constitution and has provided additional state money for an increase in Aid to Needy Blind cases in which the Federal Government does not participate, and also has provided an equivalent increase in Aid to Partially Self-supporting Blind residents. The Legislature also has provided that the legislation take effect immediately so as to relieve hardship and destitution as promptly as possible. The Legislature also has adopted urgency measures providing for increases in Old Age Security payments.

There are approximately 300,000 recipients of Old Age Security, Aid to Needy Blind, Aid to Partially Self-supporting Blind Residents and Aid to Dependent Children whose grants of aid may be affected by the legislation above-mentioned. The changes in grants cannot be accomplished under present regulations. In order for the computation of grants to be made with reasonable promptness and to effectuate the increases within a reasonable time it is necessary that this regulation take effect immediately. The giving of notice and public procedure thereon accordingly are impracticable and unnecessary and would cause delay which would be contrary to the public interest.

The regulation shall become operative October 1, 1952.

The regulation shall be effective immediately when and only when both of the following events have occurred:

**ENDORSED
FILED**

In the Office of the Secretary of State
of the State of California

AUG 5 1952

At _____ o'clock _____ M.

FRANK M. JORDAN, Secretary of State
By CHAS. J. HAGERTY
Assistant Secretary of State

1. When the bulletin has been filed with the Secretary of State, and

2. When the urgency measures adopted by the Legislature concerning Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents have become effective.

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15 PM

FRANK M. JORDAN, Secretary of State
By _____

Assistant Secretary of State

Certified as a Regulation (or
as Regulations) of the

State Dept of Social Welfare
(Name of State Agency)

R. J. Scotland
(Signature)

Director
(Title)

9/5/52
(Date)

CHARLES I. SCHOTTLAND
Director

W&IC 103, 103.6, 3075, 3084,
3460, 3472.1
EARL WARREN
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 15, 1952

FILED

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

DEPARTMENT BULLETIN NO. 473 - SUPPLEMENT (ANB - APSB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Aid to the Blind -
Amendments to Social
Security Act and to the
W&I Code, Operative
10/1/52

Department Bulletin No. 473 (ANB - APSB) failed to
incorporate two of the several changes made by the State Social
Welfare Board:

1. The subject of the bulletin is "Aid to the Blind -
Amendments to Social Security Act and to the
W&I Code, Operative 10/1/52."
2. On Page 3, the third paragraph from the bottom
of the page should read:

"Aid increased to \$_____, effective October 1,
1952, per W&IC."

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Certified as a Regulation
as Regulations) of the

Dept of Social Welfare

(Name of State Agency)

Ed Schoutland

(Signature)

Director

(Title)

9/5/52

(Date)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
August 15, 1952

24 103, 103.5, 103.6,
1510, 1560, EARL WARREN
Governor
2020.001, 2025.1, 2160,
3084.1, 3075, 3460,
3472.1

FILED

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15 PM

FRANK M. JORDAN, Secretary of State

By _____

Subject: Changes in Fiscal Policies
and Procedures Effective
October 1, 1952

DEPARTMENT BULLETIN NO. 475 (Fiscal)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

A. Maximum Grants and Sharing Formulas

Because of the enactment by the Congress of HR 7800 (Public Law Number 590) and action taken by the State Legislature in the Second Extraordinary Session of 1952, the maximum grants and sharing formulas in the categorical aid programs for aid paid for periods beginning October 1, 1952, are as follows:

OAS

Maximum grant.	\$80
Maximum federal basis.	\$55
Federal share (eligible cases) 1/2 up to \$55 plus \$7.50	
State share.	6/7 of the remainder
County share	1/7 of the remainder

ANB

Maximum grant.	\$90
Maximum federal basis.	\$55
Federal share (eligible cases) 1/2 up to \$55 plus \$7.50	
State share.	3/4 of the remainder
County share	1/4 of the remainder

APSB

Maximum grant.	\$90
State share.	5/6 of the grant
County share	1/6 of the grant
No federal participation	

ANC (VOUCHER CASES)

Maximum state basis: 1 child \$111
2 children. \$162
3 children. \$207
4 children. \$246
5 children. \$279
6 children. \$306
7 children. \$327
8 children. \$342
9 children. \$351
Plus \$6 for each additional ANC child
in the family budget unit not to exceed
a maximum of \$387.

Maximum federal basis: \$30 for 1 eligible needy relative.
\$30 for the first federally eligible
ANC child.
\$21 for each additional federally
eligible ANC child in the family
budget unit.

Federal share: 1/2 up to maximum federal basis plus \$4.50 for
eligible needy relative and \$4.50 for each federally
eligible child.

State share: 2/3 of the remainder

County share: 1/3 of the remainder

ANC (BOARDING HOMES AND INSTITUTIONS) - Maximum grant and sharing
formulas are unchanged from those stated in Fiscal Manual
Section F-560.

The above federal sharing formulas apply to Regular (R) and Non-County (N)
cases only. Non-Federal (X) and Non-County-Non-Federal (S) cases are shared
between state and county as provided in Fiscal Manual Section F-560.

B. Authorization and Control of Changes Effective October 1, 1952

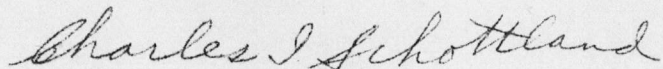
Department Bulletins Numbers 472 and 473 provide that certain types of
changes in the OAS, ANB, and APSB programs, effective October 1, 1952, may
be made in list form. If such lists are used, they shall be properly
authorized by the clerk (or deputy) of the board of supervisors or by the
agent of the board of supervisors and shall be included in reconciliation
controls as provided in Sections F-240 and F-300 of the Manual of Fiscal
Policies and Procedures. Adequate records shall be maintained in the county
to facilitate the review and audit of such mass changes by representatives
of the state and federal governments as provided in Sections F-200 and F-210.

C. Claiming Forms and Procedures

Because of the changes in federal sharing effective October 1, 1952, a new formula period begins as of that date. Consequently, an additional Claim Summary Sheet (Forms AB, CA, 802) becomes necessary to summarize transactions applicable to October 1952 and subsequent months. A revision of the present Claim Summary Sheet (Forms AB, CA, 802A) will be provided for summarizing transactions applicable to the formula period October 1, 1948 through September 30, 1952. New Certification forms (Ag, B1, CA, 800), a new Reconciliation Statement (ABC 820) and a new Schedule of Adjustments (AB, CA, 816) will also be required. The new forms (see samples attached) will be supplied to the counties with the automatic requisition for the quarter beginning October 1, 1952. These forms (all revised October 1952) will be shipped early in September. Instructions as needed are provided on the back of the forms.

All other forms used in aid claiming remain unchanged from the samples included in the form chapter of the Manual of Fiscal Policies and Procedures.

Very sincerely yours,



Charles I. Schottland
Director

Attachments

INSTRUCTIONS FOR PREPARATION OF FORM AB 802, CLAIM SUMMARY SHEET - OAS, ANB, APSB.

Fill in the name of the program (OAS, ANB, or APSB), the county name, and month of claim at the top of the form.

- A. Column A includes all warrants issued during the current month for the current month.
- B. Column B includes all warrants issued during the current month for prior months beginning October 1952 for OAS and ANB, and beginning October 1947 for APSB.
- C. Column C includes all warrants issued and cancelled during the current month for both the current and prior months beginning October 1952 for OAS and ANB and beginning October 1947 for APSB. Show all amounts in this column in red or parenthesis.
- D. Column D is the sum of Columns A plus B minus C.
- E. Column E includes all repayments received during the current month for both the current and prior months beginning October 1952 for OAS and ANB, and beginning October 1947 for APSB. Show all amounts in this column in red or parenthesis.
- F. Column F includes all warrants issued during prior months beginning October 1952 for OAS and ANB, and beginning October 1947 for APSB, which have been cancelled during the current month. Show all amounts in this column in red or parenthesis.
- G. Column G includes all adjustments (not including repayments) for items claimed in current or prior months beginning October 1952 for OAS and ANB, and beginning October 1947 for APSB. Both plus and minus adjustments are included in this column. Minus adjustments are shown in red or parenthesis. Plus adjustments are shown in black.
- H. Column H is the sum of Columns E plus F plus or minus G. If the net result is minus, the amount is shown in red or parenthesis.
- J. Column J is Column D plus or minus Column H. Show any minus amounts in this column in red or parenthesis.

Lines 1 through 14 are completed as follows:

- 1. Enter in Lines 1, 2, and 3 in Columns A through J the number of persons, amounts claimed, and excess amount for all Regular (R) case transactions as applicable to each column. Enter in Line 4 in Columns D, H, and J the difference between Lines 2 and 3 in each column and in Columns K, L, and M the respective federal, state, and county shares in all Regular payments. The total of Columns K, L, and M on Line 4 should equal the amount shown in Column J, Line 2.
- 2. Enter in Line 5, 6, 7, and 8 all transactions affecting Non-County (N) cases in the same manner as explained in paragraph 1. The totals of Columns K and L, Line 8, should equal the amount entered in Column J, Line 6.
- 3. Enter in Lines 9 and 10 all transactions affecting Non-Federal (X) cases, and on Lines 11 and 12 all transactions affecting Non-County Non-Federal (S) cases. The totals in Columns L and M, Line 10, should equal the amount entered in Column J, Line 10. The amount in Column L, Line 12, should equal the amount entered in Column J, Line 12.
- 4. Enter in Line 13, Columns A through J, the totals of Lines 3 and 7. Enter in Line 14, Columns A through J, the totals of Lines 2, 6, 10, and 12.
- 5. Enter in Line 14, Columns K, L, and M, the total federal, state, and county shares from Lines 4, 8, 10, and 12. The sum of the amounts in Columns K, L, and M on Line 14 should equal the amount entered in Column J, Line 14.

CLAIM SUMMARY SHEET

OAS and ANB Current Federal Formula Period--Beginning October 1, 1952

APSB Current Formula Period--Beginning October 1, 1947

Department of Social Welfare

Program _____ County _____
(OAS, ANB, or APSB)

Forward three copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14

Prepared by _____ Month _____, 195

EXPLANATION		TRANSACTIONS AFFECTING CURRENT MONTH				Repayments of Aid Current and Prior Months (Form 801 Contra)	Prior Month Warrants Cancelled (Form 801 Contra)	Adjustments Current and Prior Months (Form 816)	Net Total (Col. E+F + or -G)	Net Totals Current and Prior (Col. D + or -H)	PARTICIPATING SHARES		
STATUS	ITEMS	Aid Payrolls Current Month (Form 801) A	Aid Payrolls Prior Month (Form 801) B	Current Month Warrants Cancelled (Form 801 Contra) C	Net Total (Col. A+B-C) D	E	F	G	H	J	Federal K	State L	County M
REGULAR (R) CASES	1. No. of Persons										Regular (R) Cases Federal Share: \$7.50 x 1J plus $\frac{1}{2}$ of 4J. State Share OAS: $\frac{6}{7}$ of (2J minus 4K). State Share ANB: $\frac{3}{4}$ of (2J minus 4K). County Share OAS: $\frac{1}{7}$ of (2J minus 4K). County Share ANB: $\frac{1}{4}$ of (2J minus 4K).		
	2. Amount Claimed												
	3. Excess of \$55												
	4. Federal Basis (Line 2-3)												
NON-COUNTY (N) CASES	5. No. of Persons										Non-County (N) Cases Federal Share: \$7.50 x 5J plus $\frac{1}{2}$ of 8J. State Share OAS and ANB: 6J minus 8K.		
	6. Amount Claimed												
	7. Excess of \$55												
	8. Federal Basis (Line 6-7)												
NON-FEDERAL (X) CASES	9. No. of Persons										Non-Federal (X) Cases State Share: OAS $\frac{6}{7}$, ANB $\frac{3}{4}$, APSB $\frac{5}{6}$ of 10J. County Share: OAS $\frac{1}{7}$, ANB $\frac{1}{4}$, APSB $\frac{1}{6}$ of 10J.		
	10. Amount Claimed												
NON-COUNTY NON-FEDERAL (S) CASES	11. No. of Persons										Non-County-Non-Federal (S) Cases State Share OAS, ANB, and APSB: 12J.		
	12. Amount Claimed												
13. Total Excess (Sum of Lines 3 and 7)											TOTAL PARTICIPATING SHARES		
											Federal 4K + 8K	State 4L+8L+10L+12L	County 4M + 10M
14. Total Amount Claimed (Sum of Lines 2,6,10, & 12)													

INSTRUCTIONS FOR PREPARATION OF FORM CA 802, CLAIM SUMMARY SHEET---AID TO NEEDY CHILDREN

Indicate by an X in the head of the form whether the form is prepared for an ANC Voucher or an ANC BHI (cash) claim. Indicate also the county name and the month of claim.

- A. Column A includes all warrants issued during the current month for the current month.
- B. Column B includes all warrants issued during the current month for prior months beginning October 1952 for voucher claims, and beginning October 1939 for BHI claims.
- C. Column C includes all warrants issued and cancelled during the current month for both the current and prior months beginning October 1952 for voucher claims and beginning October 1939 for BHI claims. Show all amounts in this column in red or parenthesis.
- D. Column D is the sum of Columns A plus B minus C.
- E. Column E includes all repayments received during the current month for both the current and prior months beginning October 1952 for voucher claims, and beginning October 1939 for BHI claims. Show all amounts in this column in red or parenthesis.
- F. Column F includes all warrants issued during prior months beginning October 1952 for voucher claims, and beginning October 1939 for BHI claims, which have been cancelled during the current month. Show all amounts in this column in red or parenthesis.
- G. Column G includes all adjustments (not including repayments) for items claimed in current or prior months beginning October 1952 for voucher claims, and beginning October 1939 for BHI claims. Both plus and minus adjustments are included in this column. Minus adjustments are shown in red or parenthesis. Plus adjustments are shown in black.
- H. Column H is the sum of Columns E plus F plus or minus G. If the net result is minus, the amount is shown in red or parenthesis.
- J. Column J is Column D plus or minus Column H. Show any minus amounts in this column in red or parenthesis.

Lines 1 through 11 are completed as follows:

- 1. Enter in Line 1 in Columns A through M the warrant amounts including any county supplemental aid as applicable according to each column heading. The amount in Column M should be the difference between Line 1, Column J and Line 11, Column J.
- 2. Enter in Lines 2, 3, 4, and 5 in Columns A through J the number of persons and the federal and state bases for all Regular (R) and Non-Federal (X) transactions as applicable to each column. Enter on Line 5, Columns K, L, and M the respective federal, state and county shares in all of these payments. The total of Columns K, L, and M on Line 5 should equal the amount shown in Column J, Line 5.
- 3. Enter in Lines 6, 7, 8, and 9 all transactions affecting Non-County (N) and Non-County-Non-Federal (S) cases in the same manner as explained in paragraph 2 above. The total of Columns K and L, Line 9 should equal the amount entered in Column J, Line 9.
- 4. Enter in Line 10, Columns A through J the totals of Lines 4 and 8. Enter in Line 11, Columns A through J the totals of Lines 5 and 9.
- 5. Enter in Line 11, Columns K, L and M the total federal, state and county shares from Lines 1, 5 and 9. The sum of the amounts in Columns K, L and M on Line 11 should equal the amount entered in Column J, Line 1.

☐ Voucher Claim

☐ BHI (Cash) Claim

PREPARED BY _____

Current Federal Formula Period - Beginning October 1, 1952

Current Formula Period - Beginning October 1, 1939

COUNTY _____

Forward three copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14.

MONTH _____, 195

EXPLANATION		TRANSACTIONS AFFECTING CURRENT MONTH				Repayments of Aid Current and Prior Months	Prior Month Warrant Cancellations	Adjustments Current and Prior Months	Net Totals (Col. E + F + or - G)	Net Totals Current and Prior Months			
STATUS	ITEMS	Aid Payrolls Current Month (Form 801) A	Aid Payrolls Prior Months (Form 801) B	Current Month Warrants Cancelled (Form 801 Contra) C	Net Totals (Col. A + B - C) D	(Form 801 Contra) E	(Form 801 Contra) F	(Form 816) G	H	J	Federal	State	County
1. Total Warrant Amount Including County Supplemental													Supplemental (1J minus 1I)
REGULAR (R) AND NON-FEDERAL (X)	2. No. of R Persons										Regular (R) and Non-Federal (X) Cases Federal Share: \$4.50 x 2J plus 1/2 of 4J. State Share: 2/3 of (5J minus 5K). County Share: 1/3 of (5J minus 5K).		
	3. No. of X Persons												
	4. Federal Basis												
	5. State Basis												
NON-COUNTY (N) AND NON-COUNTY-NON- FEDERAL (S)	6. No. of N Persons										Non-County (N) and Non-County- Non-Federal (S) Cases Federal Share: \$4.50 x 6J plus 1/2 of 8J. State Share: 9J minus 9K.		
	7. No. of S Persons												
	8. Federal Basis												
	9. State Basis												
10. Total Federal Basis (Sum of Lines 4 and 8)											Total Participating Shares		
											Federal (Lines 5 & 9)	State (Lines 5 & 9)	County (Lines 1 & 5)
11. Total State Basis (Sum of Lines 5 and 9)													

INSTRUCTIONS FOR PREPARATION OF FORM AB 802A, CLAIM SUMMARY SHEET - OAS OR ANB.
Federal Formula Period - October 1, 1948 through September 30, 1952

Fill in the name of the program (OAS or ANB), the county name, and month of claim at the top of the form.

- B. Column B includes all warrants issued during the current month for months prior to October 1952.
- C. Column C includes all warrants issued and cancelled during the current month for months prior to October 1952. Show all amounts in this column in red or parenthesis.
- D. Column D is Column B minus Column C.
- E. Column E includes all repayments received during the current month for the period from October 1, 1948 through September 30, 1952. Show all amounts in this column in red or parenthesis.
- F. Column F includes all warrants issued during months prior to October 1952 which have been cancelled during the current month. Show all amounts in this column in red or parenthesis.
- G. Column G includes all adjustments (not including repayments) for items claimed in current or prior months for the period October 1, 1948 through September 30, 1952. Both plus and minus adjustments are included in this column. Minus adjustments are shown in red or parenthesis. Plus adjustments are shown in black.
- H. Column H is the sum of Columns E plus F plus or minus G. If the net result is minus, the amount is shown in red or parenthesis.
- J. Column J is Column D plus or minus Column H. Show any minus amounts in this column in red or parenthesis.

Lines 1 through 14 are completed as follows:

- 1. Enter in Lines 1, 2, and 3 in Columns B through J the number of persons, amounts claimed, and excess amount for all Regular (R) case transactions as applicable to each column. Enter in Line 4 in Columns D, H, and J the difference between Lines 2 and 3 in each column and in Columns K, L, and M the respective federal, state, and county shares in all Regular payments. The total of Columns K, L, and M on Line 4 should equal the amount shown in Column J, Line 2.
- 2. Enter in Line 5, 6, 7, and 8 all transactions affecting Non-County (N) cases in the same manner as explained in paragraph 1. The totals of Columns K and L, Line 8, should equal the amount entered in Column J, Line 6.
- 3. Enter in Lines 9 and 10 all transactions affecting Non-Federal (X) cases, and on Lines 11 and 12 all transactions affecting Non-County Non-Federal (S) cases. The totals in Columns L and M, Line 10, should equal the amount entered in Column J, Line 10. The amount in Column L, Line 12, should equal the amount entered in Column J, Line 12.
- 4. Enter in Line 13, Columns B through J, the totals of Lines 3 and 7. Enter in Line 14, Columns B through J, the totals of Lines 2, 6, 10, and 12.
- 5. Enter in Line 14, Columns K, L, and M, the total federal, state, and county shares from Lines 4, 8, 10, and 12. The sum of the amounts in Columns K, L, and M on Line 14 should equal the amount entered in Column J, Line 14.

OLD AGE SECURITY OR AID TO NEEDY BLIND CLAIM SUMMARY SHEET
Federal Formula Period--October 1, 1948, through September 30, 1952

Program _____ County _____
(OAS or ANB)

Forward three copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14

Prepared by _____ Month _____, 195 _____

EXPLANATION		PRIOR MONTH WARRANTS ISSUED AND CANCELLED DURING CURRENT MONTH			Repayments of Aid (Form 801 Contra) E	Warrants Cancelled Issued in Prior Months (Form 801 Contra) F	Adjustments (Form 816) G	(Col. E+F + or -G) H	Net Totals (Col. D + or -H) J	PARTICIPATING SHARES		
STATUS	ITEMS	Aid Payrolls (Form 801) B	Warrants Cancelled (Form 801 Contra) C	(Col. B-C) D						Federal K	State L	County M
REGULAR (R) CASES	1. No. of Persons									Regular (R) Cases Federal Share: \$5 x 1J plus 1/2 of 4J. State Share OAS: 6/7 of (2J minus 4K). State Share ANB: 3/4 of (2J minus 4K). County Share OAS: 1/7 of (2J minus 4K). County Share ANB: 1/4 of (2J minus 4K).		
	2. Amount Claimed											
	3. Excess of \$50											
	4. Federal Basis (Line 2-3)											
NON-COUNTY (N) CASES	5. No. of Persons									Non-County (N) Cases Federal Share: \$5 x 5J plus 1/2 of 8J. State Share OAS and ANB: 6J minus 8K.		
	6. Amount Claimed											
	7. Excess of \$50											
	8. Federal Basis (Line 6-7)											
NON-FEDERAL (X) CASES	9. No. of Persons									Non-Federal (X) Cases State Share: OAS 6/7, ANB 3/4, APSB 5/6 of 10J. County Share: OAS 1/7, ANB 1/4, APSB 1/6 of 10J.		
	10. Amount Claimed											
NON-COUNTY NON-FEDERAL (S) CASES	11. No. of Persons									Non-County-Non-Federal (S) Cases State Share OAS, ANB, and APSB: 12J.		
	12. Amount Claimed											
13. Total Excess (Sum of Lines 3 and 7)										TOTAL PARTICIPATING SHARES		
14. Total Amount Claimed (Sum of Lines 2, 6, 10, & 12)										Federal 4K + 8K	State 4L+8L+10L+12L	County 4M + 10M

INSTRUCTIONS FOR PREPARATION OF FORM CA 802A, VOUCHER CLAIM SUMMARY SHEET--AID TO NEEDY CHILDREN
FEDERAL FORMULA PERIOD--OCTOBER 1, 1948 THROUGH SEPTEMBER 30, 1952

- B. Column B includes all warrants issued during the current month for months prior to October 1952.
- C. Column C includes all warrants issued and cancelled during the current month for months prior to October 1952. Show all amounts in this column in red or parenthesis.
- D. Column D is Column B minus C.
- E. Column E includes all repayments received during the current month for the period from October 1, 1948 through September 30, 1952. Show all amounts in this column in red or parenthesis.
- F. Column F includes all warrants issued during months prior to October 1952 which have been cancelled during the current month. Show all amounts in this column in red or parenthesis.
- G. Column G includes all adjustments (not including repayments) for items claimed in current or prior months for the period October 1, 1948 through September 30, 1952. Both plus and minus adjustments are included in this column. Minus adjustments are shown in red or parenthesis. Plus adjustments are shown in black.
- H. Column H is the sum of Columns E plus F plus or minus G. If the net result is minus, the amount is shown in red or parenthesis.
- J. Column J is Column D plus or minus Column H. Show any minus amounts in this column in red or parenthesis.

Lines 1 through 11 are completed as follows:

- 1. Enter in Line 1 in Columns B through M the warrant amounts including any county supplemental aid as applicable according to each column heading. The amount in Column M should be the difference between Line 1, Column J and Line 11, Column J.
- 2. Enter in Lines 2, 3, 4, and 5 in Columns B through J the number of persons and the federal and state bases for all Regular (R) and Non-Federal (X) transactions as applicable to each column. Enter on Line 5, Columns K, L, and M the respective federal, state and county shares in all of these payments. The total of Columns K, L, and M on Line 5 should equal the amount shown in Column J, Line 5.
- 3. Enter in Lines 6, 7, 8, and 9 all transactions affecting Non-County (N) and Non-County-Non-Federal (S) cases in the same manner as explained in paragraph 2 above. The total of Columns K and L, Line 9 should equal the amount entered in Column J, Line 9.
- 4. Enter in Line 10, Columns B through J the totals of Lines 4 and 8. Enter in Line 11, Columns B through J the totals of Lines 5 and 9.
- 5. Enter in Line 11, Columns K, L and M the total federal, state and county shares from Lines 1, 5 and 9. The sum of the amounts in Columns K, L and M on Line 11 should equal the amount entered in Column J, Line 1.

Federal Formula Period - October 1, 1948 through September 30, 1952

PREPARED BY _____

COUNTY _____

Forward three copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14.

MONTH _____, 195 _____

EXPLANATION		WARRANTS ISSUED AND CANCELLED DURING CURRENT MONTH			Repayments of Aid (Form 801 Contra) E	Warrants Cancelled, Issued in Prior Months (Form 801 Contra) F	Adjustments (Form 816) G	(Col. E + F + or - G) H	Net Totals (Col. D + or -H) J	Federal K	State L	County M
STATUS	ITEMS	Aid Payrolls (Form 801) B	Warrants Cancelled (Form 801 Contra) C	(Col. B -C) D								
1. Total Warrant Amount Including County Supplemental												Supplemental (1J minus 11J)
REGULAR (R) AND NON-FEDERAL (X)	2. No. of R Persons									Regular (R) and Non-Federal (X) Cases Federal Share: \$3 x 2J plus 1/2 of 4J. State Share: 2/3 of (5J minus 5K). County Share: 1/3 of (5J minus 5K).		
	3. No. of X Persons											
	4. Federal Basis											
	5. State Basis											
NON-COUNTY (N) AND NON-COUNTY-NON-FEDERAL (S)	6. No. of N Persons									Non-County (N) and Non-County-Non-Federal (S) Cases Federal Share: \$3 x 6J plus 1/2 of 8J. State Share: 9J minus 9K.		
	7. No. of S Persons											
	8. Federal Basis											
	9. State Basis											
10. Total Federal Basis (Sum of Lines 4 and 8)										Total Participating Shares		
										Federal (Lines 5 & 9)	State (Lines 5 & 9)	County (Lines 1 & 5)
11. Total State Basis (Sum of Lines 5 and 9)												

OLD AGE SECURITY CERTIFICATION

Forward three signed copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14

COUNTY _____

MONTH _____, 19____

EXPLANATION		PERSONS COUNT		AMOUNTS CLAIMED				FOR STATE USE ONLY		
Federal Formula Period	Items	No. of Persons Eligible to Federal Participation (Form 802 & 802A Line 1 plus 5) A	No. of Persons Ineligible to Federal Participation (Form 802 & 802A Line 9 plus 11) B	Total Aid Paid (or Repaid) (Form 802 & 802A Line 14) C	Amount Ineligible to Federal Participation (Form 802 & 802A Line 10 plus 12) D	Amount in Excess of Federal Base (Form 802 & 802A Line 13) E	Federal Basis Amount (Form 802 & 802 A Line 4 plus 8) F			
PERIOD BEGINNING 10/1/52	1. Total Aid Paid in Current month. (Form AB 802, Column D)									
	2. Plus or Minus Repayments, Adjustments & Prior Months' Cancellations. (Form AB 802, Column H)							PARTICIPATING SHARES		
	3. Net Adjusted Aid Claimed. (Cols. A thru F from Form AB 802, Col. J) (Cols. G, H, J from Form AB 802, Line 14, Cols. K, L, M)							FEDERAL G	STATE H	COUNTY J
PERIOD 10/1/48 THROUGH 9/30/52	4. Net Adjusted Aid Claimed. (Cols. A thru F from Form AB 802A, Col. J) (Cols. G, H, J from Form AB 802A, Line 14, Cols. K, L, M)									
PERIOD 10/1/46 THROUGH 9/30/48	5. Repayments of Aid for this Period. (Form ABC 803, Schedule of Repayments)	Col. 10 - Form 803		Col. 4 - Form 803	Total X and S Cases Col. 4 - Form 803	Col. 6 - Form 803	Col. C minus Cols. D and E, Form Ag800	Col. 7 - Form 803	Col. 8 - Form 803	Col. 9 - Form 803
PERIODS PRIOR TO 10/1/46	6. Repayments of Aid for this Period. (Form ABC 803, Schedule of Repayments)									
TOTALS ALL PERIODS	7. Net Adjusted Aid Claimed for all Periods. (Lines 3 plus 4 minus Lines 5 and 6, Form Ag 800)									

I HEREBY CERTIFY, under penalty of perjury, that I am the official responsible for the administration of Old Age Security in and for said county; that the aid payments, repayments, and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the State Social Welfare Board.

Signature of County Welfare Director

Date _____, 195____

I HEREBY CERTIFY, under penalty of perjury, that I am the officer in aforesaid county responsible for the examination and settlement of accounts; that the amounts claimed herein are in accordance with authorizations for Old Age Security made by the county; that said amounts correctly reflect Federal, State, and County shares in the aid payments claimed; and that warrants therefor have been issued according to law and the rules and regulations of the State Social Welfare Board.

Signature of County Auditor

Date _____, 195____

EXPLANATION		PERSONS COUNT		AMOUNTS CLAIMED				FOR STATE USE ONLY		
Formula Period	Items	No. of Persons Eligible to Federal Participation (Form 802 & 802A Line 1 Plus 5) A	No. of Persons Ineligible to Federal Participation (Form 802 & 802A Line 9 Plus 11) B	Total Aid Paid (or Repaid) (Form 802 & 802A Line 14) C	Amount Ineligible to Federal Participation (Form 802 & 802A Line 10 Plus 12) D	Amount in Excess of Federal Base (Form 802 & 802A Line 13) E	Federal Basis Amount (Form 802 & 802A Line 4 Plus 8) F			
ANB CLAIM PERIOD BEGINNING 10/1/52 OR APSB CLAIM PERIOD BEGINNING 10/1/47	1. Total Aid Paid in Current Month. (Form AB 802, Column D)									
	2. Plus or Minus Repayments, Adjustments & Prior Months' Cancellations. (Form AB 802, Column H)							PARTICIPATING SHARES		
	3. Net Adjusted Aid Claimed (Cols. A thru F from Form AB 802, Col. J) (Col. G, H, J from Form AB 802, Line 14, Col. K, L, M)							FEDERAL G	STATE H	COUNTY J
ANB CLAIM PERIOD 10/1/48 THROUGH 9/30/52	4. Net Adjusted Aid Claimed (Cols. A thru F from Form AB 802A, Col. J) (Col. G, H, J from Form AB 802A, Line 14, Col. K, L, M)									
ANB CLAIM PERIOD 10/1/46 THROUGH 9/30/48	5. Repayments of Aid for this Period (Form ABC 803, Schedule of Repayments)	Col. 10 - Form 803		Col. 4 - Form 803	Total X and S Cases Col. 4 - Form 803	Col. 6 - Form 803	Col. C minus Cols. D and E, Form BI 800	Col. 7 - Form 803	Col. 8 - Form 803	Col. 9 - Form 803
PERIODS PRIOR TO 10/1/46 ANB 10/1/47 APSB	6. Repayments of Aid for this Period (Form ABC 803, Schedule of Repayments)									
TOTALS ALL PERIODS	7. Net Adjusted Aid Claimed for All Periods (Lines 3 plus 4 minus Lines 5 and 6, Form BI 800)									

I HEREBY CERTIFY, under penalty of perjury, that I am the official responsible for the administration of Aid to Needy Blind or Aid to Partially Self-supporting Blind Residents in and for aforesaid county; that the aid payments, repayments, and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the State Social Welfare Board.

I HEREBY CERTIFY, under penalty of perjury, that I am the officer in aforesaid county responsible for the examination and settlement of accounts; that the amounts claimed herein are in accordance with authorizations for Aid to Needy Blind or Aid to Partially Self-supporting Blind Residents made by the county; that said amounts correctly reflect Federal, State, and County shares in the aid payments claimed; and that warrants therefor have been issued according to law and the rules and regulations of the State Social Welfare Board.

Signature of County Welfare Director

Signature of County Auditor

Date, 195

Date, 195

Form BI 800, Revised October 1952

AID TO NEEDY CHILDREN CERTIFICATION



VOUCHER CLAIM



BHI (CASH) CLAIM

(Indicate Type of Claim)

COUNTY _____

MONTH _____, 19____

Forward three signed copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14

EXPLANATION		PERSONS COUNT		AMOUNTS CLAIMED			FOR STATE USE ONLY		
Formula Period	Items	No. of Persons Eligible to Federal Participation (Form 802 & 802A Line 2 plus 6) A	No. of Persons Ineligible to Federal Participation (Form 802 & 802A Line 3 plus 7) B	Warrant Amount (Form 802 & 802A Line 1) C	State Basis Amount all Cases (Form 802 & 802A Line 11) D	Federal Basis Amount (Form 802 & 802A Line 10) F			
VOUCHER CLAIM PERIOD BEGINNING 10/1/52 OR BHI CLAIM PERIOD BEGINNING 10/1/39	1. Total Aid Paid in Current Month (Form CA 802, Column D)								
	2. Plus or Minus Repayments, Adjustments and Prior Months' Cancellations. (Form CA 802, Column H)						PARTICIPATING SHARES		
	3. Net Adjusted Aid Claimed. (Cols. A thru F from Form CA 802, Column J) (Cols. G, H, J, from Form CA 802 Line 11, Cols. K, L, M)						Federal G	State H	County J
VOUCHER CLAIM PERIOD 10/1/48 THROUGH 9/30/52	4. Net Adjusted Aid Claimed. (Cols. A thru F from Form CA 802A, Column J) (Cols. G, H, J, from Form CA 802A Line 11, Col. K, L, M)								
VOUCHER CLAIM PERIOD 10/1/46 THROUGH 9/30/48	5. Repayments of Aid For This Period. (Form ABC 803, Schedule of Repayments)	Col. 10 - Form 803		Col. 4 - Form 803	Col. 5 - Form 803	Col. 6 - Form 803	Col. 7 - Form 803	Col. 8 - Form 803	Col. 9 - Form 803
PERIODS PRIOR TO 10/1/46 VOUCHER 10/1/39 BHI	6. Repayments of Aid For This Period. (Form ABC 803, Schedule of Repayments)								
TOTALS ALL PERIODS	7. Net Adjusted Aid Claimed for all Periods. (Lines 3 plus 4 minus Lines 5 and 6, Form CA 800)								

I HEREBY CERTIFY, under penalty of perjury, that I am the official responsible for the administration of Aid to Needy Children in and for aforesaid county; that the aid payments, allotments for payments in kind, aid repayments and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the State Social Welfare Board.

Signature of County Welfare Director

Date _____, 195____

I HEREBY CERTIFY, under penalty of perjury, that I am the officer in aforesaid county responsible for the examination and settlement of accounts; that the amounts claimed herein are in accordance with authorizations for Aid to Needy Children made by the county; that said amounts correctly reflect Federal, State and County Shares in the aid payments claimed and that warrants therefor have been issued, or funds made available for the payments in kind listed herein according to law and the rules and regulations of the State Social Welfare Board.

Signature of County Auditor

Date _____, 195____

RECONCILIATION STATEMENT
COUNTY AUTHORIZATIONS TO AUDITOR'S PAYMENTS
AS CLAIMED TO SDSW

PROGRAM _____

COUNTY _____

MONTH OF CLAIM _____, 19____

1. Continuing Aid Payments (Item 7 of the Reconciliation Statement, Form ABC 820, of the Previous Month) \$ _____
2. Add new Aid Payments Authorized for this Month (all new cases and restorations) (Col. 3, Form ABC 822) \$ _____
3. Add the Amount of Increases in Continuing Aid Payments Authorized to be paid this Month (Col. 4, Form ABC 822) _____
4. Sub total (Item 1 plus Items 2 and 3) _____
5. Subtract all Aid Payments Authorized to be discontinued which affect this month. (Col. 5, Form ABC 822). _____
6. Subtract the Amount of Decreases in Continuing Aid Payments Authorized to become effective this Month (Col. 6, Form ABC 822) _____
7. Net Amount of Continuing Aid Payments Authorized for this Month (Item 4, less the sum of Items 5 and 6) _____
8. Add the Amount of Aid Authorized to be paid this month for Prior Months (Item 8, Form ABC 822) _____
9. Total Aid Authorized to be paid this Month (Item 7 plus Item 8) _____
10. Amount Claimed this Month
a. Line 1, Col. C, Form Ag, Bl, or CA 800. _____
b. Line 14, Col. D, Form AB 802A; or
Line 1, Col. D, Form CA 802A. _____
c. Total aid claimed (Items 10a plus 10b). _____
11. Difference, if any, between Item 9 and Item 10c. Explain any difference below or on a separate sheet _____

CERTIFICATION

I hereby certify that the amounts stated herein are true and correct and are properly supported by auditable records conveniently accessible in the county.

SIGNED: _____ TITLE: _____ DATE: _____, 195____

INSTRUCTIONS

Forward three copies with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14.

Enter in the heading the County Name and the Month of the Claim. The body of the form is completed as follows:

- Item 1. Enter the amount of the continuing aid authorized by the county for the previous month. This will be the same figure as stated in Item 7 of the previous month's reconciliation statement unless there has been an error in amounts previously reported. Any correction of a previous error is to be fully explained as a reconciling item.
- Item 2. The amount to be entered here will include all authorized new cases and restorations (both regular and conditional) effective during month of claim. If aid is authorized to begin during the month only the amount of the authorization for the partial month should be entered. If the county authorized any items for the month which could not be paid until the next month such items are to be included in the next month's reconciliation statement. This should be controlled at the time Batch Vouchers (Form 821) are made up, as a voucher should include only authorizations which can be paid in a specific month. The amount entered here is transcribed from the total in Col. 3 of Form ABC 822, Register of County Authorizations, for the month of claim.
- Item 3. The same rule applies here as for Item 2. Include only increases which were effected in the month of claim; i.e., the net amount by which grants were to be increased. This includes increases to bring the immediate previous month's partial payment up to the total authorized monthly grant. Do not include authorizations covering supplemental payments for prior months. These are to be included in Item 8. The amount entered here is transcribed from the total in Col. 4 of Form ABC 822, Register of County Authorizations, for the month of claim.
- Item 4. Sub-total. Item 1 plus the sum of Items 2 and 3.
- Item 5. Enter the amount of all discontinuances authorized to become effective on the last day of a previous month. If the county authorized discontinuances which the Auditor could not effect because warrants therefor had been released, such discontinuances will be included in Item 5 of the next month's reconciliation statement. The amount entered here is transcribed from the total in Column 5 of Form ABC 822, Register of County Authorizations, for the month of claim.
- Item 6. Enter the amount of all decreases authorized to become effective on the first day of the month of claim; i.e., the net amount by which grants were to be decreased. If the county authorized any items for the month which could not be effected by cancellation of the original warrants and issuance of new warrants in lesser amounts until the next month, such items are to be included in Item 8 of the next month's reconciliation statement. The amount entered here is transcribed from the total in Col. 6 of Form ABC 822, Register of County Authorizations, for the month of claim.
- Item 7. Enter the net difference between Item 4 less the sum of Items 5 and 6. This figure is the amount of the continuing aid payments for the month being claimed.
- Item 8. Enter the amount of all retroactive aid authorizations approved this month for prior months including any authorizations requiring new warrants to cover retroactive decreases. Also include authorizations for return of erroneous repayments of aid. Do not include any cancellations for warrants issued in prior months as these are not included within the scope of the reconciliation. The amount entered here is transcribed from the total in Col. 8 of Form ABC 822, Register of County Authorizations, for the month of claim.
- Item 9. Item 7 plus Item 8. This figure represents the amount of aid authorized to be paid in the month being claimed which should have been given effect by the auditor through issuance and cancellation of warrants during the month, excepting cancellation of warrants issued during prior months.
- Item 10a. Enter the net amount of aid paid as reported for the month on Form Ag, B1, or CA 800, Certification, Line 1, Column C, for the month of claim. For OAS, ANB and APSB this amount should agree with the amount shown in Column D, Line 14 of Form AB 802, Claim Summary Sheet, for the month of claim. For ANC voucher and BHI it should agree with Column D, Line 1 of Form CA 802 for the month of claim.
- Item 10b. For ANB and OAS enter the net amount of aid paid as reported for the month on Form AB 802A, Line 14, Column D. This item is not used for APSB.
- For ANC voucher claims enter the net amount of aid paid as reported for the month on Form CA 802A, Line 1, Column D. This item is not used for ANC-BHI.
- Item 10c. Sub-total. Item 10a plus Item 10b. The result is the total aid paid during the month of claim.
- Item 11. Enter the difference (plus or minus) between the amount stated in Item 9 and the amount in Item 10. If the claim has been correctly prepared in accordance with County Authorizations this figure should be zero. If there is a difference explain reconciling items in detail below the item or on a separate sheet so that they may be taken into account in preparing the claim and the reconciliation for the following month. If there has been no error in recording County Authorizations in the Register of Authorizations (or its equivalent) any difference is in the claim itself (certification, claim summary sheet or the supporting payrolls).

The certification at the foot of the form is to be completed by the county official under whose direction the reconciliation is prepared; i.e., the County Welfare Director or the County Auditor.

Note: In ANC this reconciliation is made to authorizations including county supplemental aid (Warrant amounts).

Federal Formula Period } October 1, 1948 through September 30, 1952 ☐
 } Beginning October 1, 1952. ☐
 (For OAS and ANB check one and make separate schedules for each period)

MONTH _____, 195_____

(OAS, ANB, or APSB)

For payroll items, report in red or parenthesis the persons count, warrant amount, and excess as originally claimed for each case to be adjusted; report same factors in black in corrected amounts. For contra-payroll items, report in opposite manner. Do not report by entering differences only.

[illegible]

Prepared by _____

AID TO NEEDY CHILDREN

COUNTY _____

MONTH _____, 19 ____

VOUCHER CLAIM

☐ BHI CLAIM (CASH CLAIM)

Federal Formula Period } October 1, 1948 through September 30, 1952 ☐
Beginning October 1, 1952. ☐

(For Voucher Claims check one and make separate schedules for each period.)

Forward one copy with monthly claim to State Department of Social Welfare, 616 K Street, Sacramento 14.

For payroll items, report in red or parenthesis the total persons count, State and Federal bases as originally claimed for each case to be adjusted; report same factors in black in corrected amounts. For contra-payroll items, report in opposite manner. Do not report by entering differences only.

[illegible]

FINDING OF EMERGENCY

The attached Bulletin No. 475 is an emergency regulation. Its adoption is necessary for the immediate preservation of the public peace, health and safety or general welfare within the meaning of Section 11421 of the Government Code. Notice and public procedure thereon are impracticable, unnecessary and contrary to the public interest.

The facts upon which these findings are based are as follows:

During recent months rapidly rising prices and monetary inflation have made the maximum amounts of public assistance payable to recipients thereof increasingly inadequate for their reasonable needs resulting in widespread hardship and suffering among such recipients.

The Congress of the United States, by the Social Security Act Amendments of 1952, has made additional Federal assistance available to this State for Aid to the Needy Aged, Aid to the Needy Blind and Aid to Dependent Children, for a two year period commencing October 1, 1952. The Social Security Act Amendments of 1952 also increase the amount of CASI payments to many of the recipients of aid.

The Legislature of the State of California meeting in Special Session has adopted legislation as an urgency measure necessary for the immediate preservation of the public peace, health or safety within the meaning of Article IV of the Constitution and has provided additional State money for an increase in Aid to Needy Blind cases in which the Federal Government does not participate, and also has provided an equivalent increase in Aid to the Partially Self-Supporting Blind. The Legislature also has provided that the legislation take effect immediately so as to relieve hardship and destitution as promptly as possible. The Legislature also has adopted urgency measures providing for increases in Old Age Security payments. No new state legislation was necessary to effect the changes in Aid to Needy Children cases.

There are approximately 300,000 recipients of Old Age Security, Aid to Needy Blind, Aid to Partially Self-Supporting Blind and Aid to Dependent Children whose grants of aid may be effected by the legislation above mentioned. The changes in grants cannot be accomplished under present regulations. In order for the computation of grants to be made with reasonable promptness and to effectuate the increases within a reasonable time it is necessary that this regulation take effect immediately. The giving of notice and public procedure thereon accordingly are impracticable and unnecessary and would cause delay which would be contrary to the public interest.

The regulation shall become operative October 1, 1952.

The regulation shall be effective immediately when and only when both of the following events have occurred:

1. When the bulletin has been filed with the Secretary of State, and
2. When the urgency measures adopted by the Legislature have become effective.

FILED

In the office of the Secretary of State
of the State of California

SEP 5 1952 4:15 PM

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

Certified as a Regulation (or
a Regulations) of the

Dept of Social Welfare

(Name of State Agency)

C. J. Schaefer

(Signature)

Director

(Title)

9-29-52

(Date)

REA OFFICES
LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12
SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14
SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

September 29, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 478 (OAS, ANB, APSB, ANC)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 1560, 2140, 3075, and 3460 on September 26, 1952, and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachments

FILED

In the office of the Secretary of State
of the State of California

SEP 29 1952 4:50 PM

FRANK M. JORDAN, Secretary of State
By *Chas. J. Saylor*
Assistant Secretary of State

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

September 29, 1952

DEPARTMENT BULLETIN NO. 478 (OAS, ANB, APSB, ANC)

TO: COUNTY BOARD OF SUPERVISORS
COUNTY WELFARE DEPARTMENT
COUNTY AUDITORS

Subject: Discontinuance During Transfer
Period to Adjust for Overpay-
ment Due to OASI (OAS, ANB,
APSB and ANC).

The following exceptions to the provisions of Old Age Security Manual Section A-1495, Discontinuance and Restoration of Aid During Transfer Period; Aid to the Blind Manual Section B-703, Transfer of Aid Procedures; and Aid to Needy Children Manual Sections C-125, County of Application, and C-554, Payment of Assistance in Inter-County Transfers, are effective October 29, 1952.

If in any transfer case it is necessary to discontinue assistance for one month to adjust for overpayment within the current adjustment period due to an increase in OASI or an initial OASI payment, the first county shall restore assistance. The first county shall continue assistance until the date when the second county is due to assume responsibility in the same manner as though aid had not been interrupted.

This exception applies only when discontinuance for one month is necessary in order:

- (1) To adjust for overpayment because necessary adjustment in the assistance payment was not made effective the first of the month in which the increased OASI payment became effective.
- (2) To make necessary adjustment because of the receipt of an initial OASI payment.

It is the intent of this bulletin to make the situation for the recipient and the county as close as possible to what it would have been if OASI deduction had been made in the month in which it was effective.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

FILED

In the office of the Secretary of State
of the State of California

SEP 29 1952 4:50 PM

FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State